eCopy™ ShareScan® 4.2

Installation and Setup Guide

for ALL

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Getting Started

This guide is intended for administrators responsible for installing and configuring eCopy™ ShareScan®. It provides a product overview and describes system requirements and installation and configuration procedures.

In this chapter

- Further information 2
- Technical support 3
- What's new in ShareScan 4.2. 4

Further information

The documentation set consists of the following documents:

- **eCopy ScanStand™ Assembly Instructions:** Provides information about assembling the ScanStand that is used with eCopy ScanStation™.
- **ShareScan Installation and Setup Guide:** The Quick Start section of this document guides you through the initial installation and setup process. The Reference section provides more detailed information about configuring the system and the eCopy Connectors. It also describes how to manage the Client and use the eCopy™ Connectors.
- **ShareScan Help:** The Help files contain information about configuring the system, connectors, and devices. You can easily access the Help from the Administration console.

  To access the Administration console help, in the console tree, select a node, such as "ShareScan" and then click the Help button. The Help opens in the Microsoft Management Console.

  To access help for a specific connector, in the console tree, select the connector and then click the Connector Help button, or right-click the connector name and then select Connector Help from the menu.

Technical support

Technical support is available to registered users of eCopy software during the warranty period or for the duration of your software support and maintenance agreement. Contact your supplier for details.

The maintenance agreement identifies the service provider. In most cases the dealer or distributor who provided the eCopy product to your organization also provides support. The dealer or distributor provides information about getting assistance for product installation, implementation, and usage. The eCopy Technical Support, Quality Assurance, and Development organizations provide backup support to the network of dealers and distributors. Policies established with each distributor of eCopy products determine how customer inquiries are escalated.

When you open a Technical Support case, your service provider will tell you what identification information you need to provide to validate the status of your support contract.

In addition to support provided by your dealer or distributor, the eCopy Technical Support Web site — www.ecopy.com/support — provides 24x7 access to a knowledge base that includes Frequently Asked Questions (FAQs), product support matrices, product information, and other information.

What's new in ShareScan 4.2

ShareScan® 4.2 includes new features and enhancements:

- Two versions of ShareScan 4.2. To accommodate the needs of individual groups or multiple business groups responsible for the daily workflows and practices, eCopy™ now offers two versions of ShareScan 4.2. Both versions provide the same security, administrative, and reporting features. They also include support for add-on connectors offered by eCopy and by members of the eCopy Connections Alliance Program (eCAP).

  eCopy™ ShareScan® Essentials contains features that will satisfy the essential scanning, routing, and delivery requirements of functional groups, departments, and organizations. It does this by dynamically integrating with the most common business applications and file systems. As business requirements increase within a company, many add-on connectors are available that extend functionality and connectivity to back-end applications. With the eCopy Desktop™ 9.2 license that is included with ShareScan Essentials, users can securely scan documents to Adobe's Portable Document Format (PDF) from their PC and then edit and share the scanned documents.

  eCopy™ ShareScan® Suite is the enterprise product for companies that need to integrate various Business Process Applications. This version is highly flexible and scalable right out of the box. In addition, it offers real-time integration with the most popular enterprise content management (ECM) systems. With ShareScan Suite, companies can more effectively manage the ShareScan system costs and monitor usage, for local as well as remote implementations. With the additional copies of eCopy Desktop that are included with ShareScan Suite, many more key office personnel can securely scan documents to PDF from their PC and then edit and share the scanned documents. The intuitive eCopy Desktop user interface offers advanced editing tools, including the ability to combine documents from both paper and electronic sources."

- Support for Xerox® devices.
- Support for Océ Imagistic devices.
- Support for Send to eCopy on Ricoh ScanStation devices.
- Support for the Microsoft Windows Vista™ operating system. ShareScan Embedded supports Windows Vista Enterprise and Windows Vista Business. ShareScan for ScanStation runs on Windows Vista Business.

- Support for ISIS® (Image and Scanner Interface Specification) scanner drivers.
- Support for hard keyboards for some Canon MEAP-enabled devices.
- Support for ScanStation site licenses.
- Cost Recovery Service: Can now pass Session Logon user credentials as well as Client and matter information to the eCopy Connector for RightFax, eCopy™ Connector for Interwoven WorkSite, and Open Text™ Livelink ECM™- eDOCs DM connectors.
- ID Services: Available on compatible MFP devices that use identification devices such as card readers or proximity cards. ID Services allow user authentication credentials from the identification device to be encrypted and passed to ShareScan. This preserves security and streamlines the logon process by allowing the user to avoid entering authentication credentials at the device.
- Data Publishing: Available for selected connectors and the Cost Recovery Service.
- Document Services: To learn more about Document Services, please contact your eCopy vendor. After installation, accessible through the Administration console.
- The Security Options function, which you can configure for each Services Manager, enables you to specify whether other Services Managers have the right to add or acquire devices managed by that Services Manager and to publish connector profiles to that Services Manager.
- Support for the PDF/A document format for all connectors that support PDF.
- Support for Microsoft Exchange 2007 and Microsoft Outlook 2007 in the eCopy Connector for Mail via Microsoft Exchange and the eCopy Connector for Fax via Microsoft Exchange.
- Enhancements to the eCopy Connector for Fax via Microsoft Exchange, including a Wizard that makes it easy to configure a connector profile.
- Enhancements to the eCopy Connector for Microsoft Exchange, including the ability to configure read receipts.
- Enhancements to the eCopy Connector for Fax via SMTP, including a Wizard that makes it easy to configure a connector profile.
- Enhancements to Scan to eCopy Desktop.
- Enhancements to Quick Connect, including support for WebDAV folders as destinations.

Quick Start: Installing and setting up ShareScan

ShareScan extends the capabilities of digital copiers and scanners. When installing and setting up the software, you need to understand the product components and the installation tasks.

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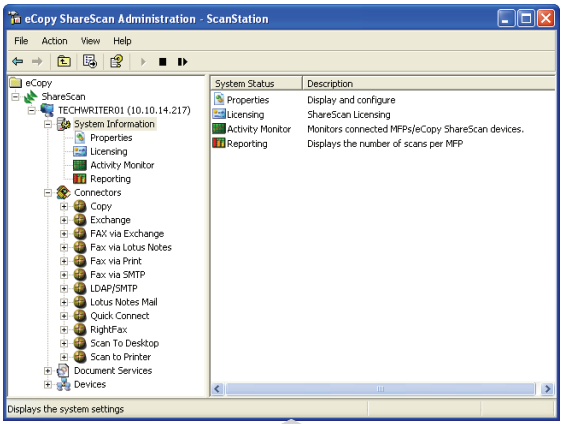
Product components

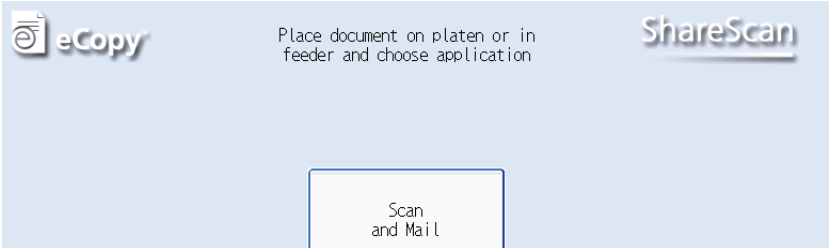
Your Client screen may not look exactly like the one in the illustration. The appearance of the screen depends on the Ricoh device that you are using.

Administration console

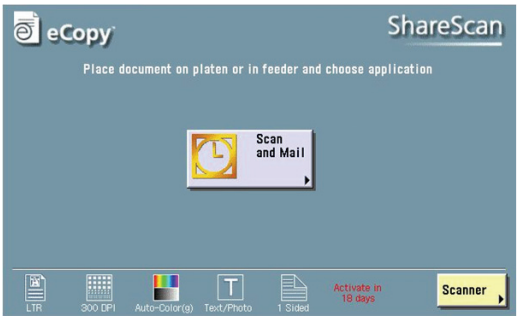


Network computer running the Services Manager and one or more connectors (applications connected to enterprise applications, such as e-mail and fax).

Client (Ricoh Embedded)



Client (running on a MEAP-enabled Canon device)



Client (running on a ScanStation)

The **ShareScan Client** is installed on a MEAP®-enabled Canon® imageRUNNER™Ricoh SDK/J-enabled deviceScanStation. It displays the user interface on the device's control panel and handles user input. It passes all information, including the raw scanned image file, to the Services Manager for processing.

The **ShareScan Services Manager** resides on a network computer running Microsoft® Windows® 2000, Windows 2003, Windows XP, or Microsoft Vista. ShareScan does not require any special server hardware. The Services Manager handles requests from the client, returns user interface screens and preview images to the client, and creates the master image file according to the selected options (file type, searchable text, encryption, etc.). It also manages all connected devices; a single Services Manager can support multiple clients.

The **Connectors**, which reside on the same computer as the Services Manager, provide connectivity to back-end applications. For example, the eCopy Connector for Microsoft Exchange enables users to scan documents and e-mail them using Microsoft Exchange. The eCopy Connector for Fax via Lotus Notes enables users to scan documents and fax them using Lotus Notes.

The **eCopy Services**, including Bates Numbering Service and Cost Recovery Service, provide additional capabilities that enhance eCopy ShareScan.

The **Administration console** is a Microsoft Management Console (MMC) snap-in that enables system administrators to configure and administer Services Managers, eCopy Connectors, eCopy Services, and devices.

Installation tasks

Before installing the product, see page 321 for information about hardware, software, and network requirements.

To install and configure ShareScan, you perform the following tasks:

- Install the ShareScan JAR (Java™ Archive) file, which contains the ShareScan Client, on the device.
- Install the ShareScan software (Services Manager, Administration console, and the eCopy Connectors supplied with the installation program) on a network computer).
- License devices.
- Install a TWAIN or ISIS driver.

> **Note:** If you are using the ScanStation *only* with Send to eCopy, you do not need to install a TWAIN driver. If you are using the ScanStation with Send to eCopy as well as with scanners configured to use a TWAIN or ISIS driver, you use a single product key to license the ScanStation

- Install the touch screen driver on the ScanStation. However, you do not need to install this driver if you have an existing ScanStation on which the driver was pre-loaded.
- Install the ShareScan software (Services Manager, Administration console, eCopy Connectors supplied with the installation program, and Client) on the ScanStation.
- License and configure the ScanStation device.
- Configure and activate connector profiles.
- Configure and start the ScanStation Client.

Installing the JAR file on a MEAP-enabled device

The JAR file contains the ShareScan Client.

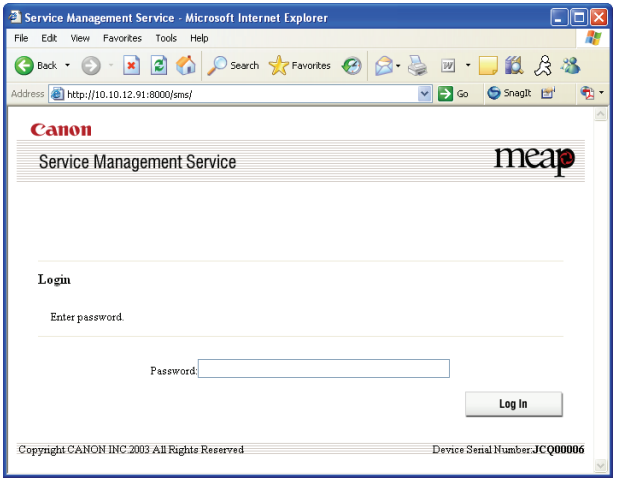
Before you can acquire Canon MEAP-enabled devices for use with ShareScan, you must install the JAR file (ShareOp.jar) and the license file on the devices.

Important! If you must uninstall ShareScan from a MEAP-enabled device, contact Technical Support. The Canon license allows only a single installation of the JAR file.

Before installing the JAR file, make sure that you turn off the Department ID, the Single Sign-On (SSO) ID, or the Simple Device Login (SDL), if they are enabled. After installing the JAR file, you can turn on the IDs again..

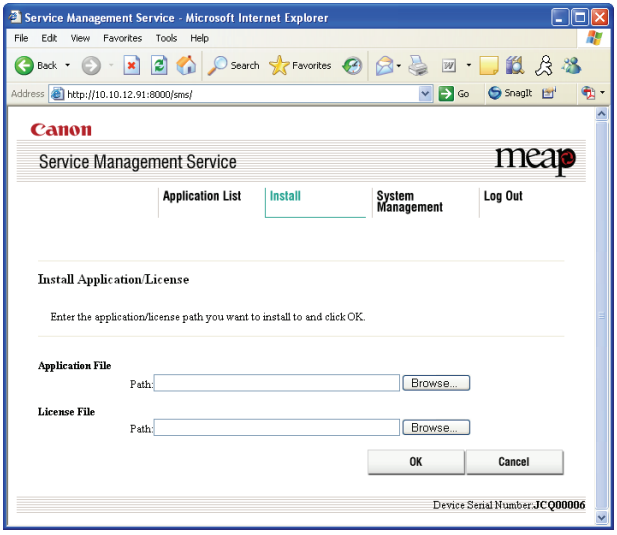
To install the JAR file:

1 Open a Web browser and point to the device's Web server, as in the following example:



2 Enter the device's login password and then click **Log In**.

3 In the **Service Management Service** window, click **Install**.



4 In the **Application File** field, enter the location of the ShareOp.jar file on the CD.

5 In the **License File** field, enter the location of the license.lic file on the CD.

6 On the confirmation screen, click **OK**.

7 Review the ShareScan application information and then click **OK** to install the application.

8 In the **Service Management Service** window, click **Application List**, select **ShareScan** and then click **Start**.

9 Click **Log Out**.

Installing the JAR file on a Ricoh Embedded device running SDK/J version 1.x

The JAR file contains the ShareScan Client.

Before you can use ShareScan with Ricoh Embedded devices, you must install the JAR file (ShareScanOp.jar) and the DALP file on the devices. They are provided on an SD card.

This procedure assumes that SDK/J version 1.x is installed on the device. Note the slot in which you installed the card.

If you are not the person who installed the SDK/J and you do not know which slot the SDK/J SD card is installed in, you can find out by pressing the User Tools/Counter button on the control panel. Then, on the display panel, press Extended Feature Settings > Extended Features. Note the SD Card Slot number for the Java™ platform and then press Exit twice.

To install the JAR file:

1. Turn off the main power switch. When the power is off, the Main Power indicator on the control panel, located above the On indicator for the Operation switch, will no longer be illuminated.

   Note: See the documentation for your device for the location of the main power switch.

2. Insert the eCopy SD card in the slot that does *not* contain the SDK/J SD card and then turn on the main power switch.

   The Main Power indicator will be illuminated.

3. To start the SDK/J platform, press the key that was associated with the platform when it was installed and then select the Java™ platform from the Other functions display.
4. Press **Menu**.
5. Press **Login**. Leave the **User Code** field blank (you do not need to enter a user code) and then press #.
6. To install the application:
   - Press the **Install** tab.
   - Select the ShareScan Xlet.
   - Select **Hard Disk** as the destination.

- When the **Ext. feature info** screen appears, press **OK**.

Note: eCopy recommends that you leave the Auto Start option selected during installation of the JAR file.

- When the installation is complete, press **OK**.

Note: Do not turn off the main power until the panel displays the Add device to Manager screen.

7. When the **Add device to Manager** screen appears, indicating that the application is initialized, turn off the main power switch and then remove the eCopy SD card.
8. If you removed an SD card from slot 3, insert it back in slot 3 and then turn on the main power switch.

To uninstall and reinstall the JAR file:

1. To start the SDK/J platform, press the key that was associated with the platform when it was installed and then select the Java™ platform from the Other functions display.
2. Press **Menu** and then press **Login**. Leave the **User Code** field blank (you do not need to enter a user code) and then press #.
3. To stop the application, select the **Stop/Start** tab, select the taken Xlet, and then press **Execute**.
4. To uninstall the JAR file, select the **Uninstall** tab, select the ShareScan OP xlet, and then press **OK**.

   The **Uninstallation confirmation** window appears. Press **OK**.
5. Turn off the main power switch.
6. Turn on the main power switch.
7. See the instructions for installing the JAR file (see page 14).

Installing the JAR file on a Ricoh Embedded device running SDK/J version 2.09 or later

The JAR file contains the ShareScan Client.

Before you can use ShareScan with Ricoh Embedded devices, you must install the JAR file (ShareScanOp.jar) and the DALP file on the devices. They are provided on an SD card.

This procedure assumes that SDK/J version 2.09 or later is installed on the device. Note the slot in which you installed the card.

If you are not the person who installed the SDK/J and you do not know which slot the SDK/J SD card is installed in, you can find out by pressing the User Tools/Counter button on the control panel. Then, on the display panel, press Extended Feature Settings > Extended Features. Note the SD Card Slot number for the Java™ platform and then press Exit twice.

To install the JAR file:

1. Turn off the main power switch. When the power is off, the Main Power indicator on the control panel, located above the On indicator for the Operation switch, will no longer be illuminated.

   Note: See the documentation for your device for the location of the main power switch.

2. Insert the eCopy SD card in the slot that does *not* contain the SDK/J SD card and then turn on the main power switch.

   The Main Power indicator will be illuminated.

3. Press **User Tools/Counter**.
4. Press **Extended Feature Settings**.
5. Press **Extended Feature Settings** again.
6. To install the application:
   - Press the **Install** tab and then select **SD Card**.
   - Select **ShareScan**.
   - Select **Machine HDD** as the installation target and then press **Next**.
   - When the **Extended Feature Settings** screen appears, press **OK**.

     Note: eCopy recommends that you leave the Auto Start option selected during installation of the JAR file.

   - When the installation is complete, press **Exit**.

7 Turn off the main power switch and then remove the eCopy SD card.

8 If you removed an SD card from slot 3, insert it back in slot 3 and then turn on the main power switch.

With the **Auto Start** option selected, the application will start when the device is started up.

To uninstall and reinstall the JAR file:

1 Press **User Tools/Counter**.

2 Press **Extended Feature Settings** twice.

3 To stop **ShareScan**, select **Startup Setting** and then select **ShareScan**.

You may have to do this twice. The status must be "Stop".

4 To uninstall the JAR file, select the **Uninstall** tab, select **ShareScan**, and then press **Yes**.

The **Complete extended feature uninstallation** window appears.

5 Press **Exit**.

The **Ready to uninstall** window appears.

6 Press **Exit**.

7 Turn off the main power switch.

8 Turn on the main power switch.

9 See the instructions for installing the JAR file (see page 16).

Installing a Canon TWAIN driver

The ScanStation uses a TWAIN driver to get input from the device. You must install and configure the driver before licensing the device.

If you are using supported Windows operating systems other than Windows Vista, you can use Canon's Color Network ScanGear v2.01 or Network ScanGear v2.0.1. If you are using Windows Vista, you must use Canon's Color Network ScanGear v2.2 or Network ScanGear v2.2.

eCopy recommends that you install the driver on the domain where it will be used.

To install the driver:

1. Insert the eCopy ShareScan CD (Disk 2) in the drive. (You can also look for drivers on your network or download them from the Internet.)
2. Open the Canon folder and then open the folder for the driver that you want to install.
3. Run the installation program, following the instructions on the screen.

   Note: If you are installing Color Network ScanGear, you must log on using an Administrator account. eCopy recommends that you read the Readme.txt file provided with the driver. It provides important information about where to install the driver for "Restricted Users". It also provides information about listing Color Network ScanGear and ScanGear Tool on the Exceptions tab in Windows Firewall.

4. When the installation is complete, click **Finish**.

To configure the driver:

1. Select **Start** > **Programs** > *driver_name* > **ScanGear Tool**.
2. Click **Discover** to list the devices on your network that can use this driver.

   The tool displays the "Discovering scanners" message and then displays the list of available scanners.
3. Select the scanner that you want to use and then click **Select**.
4. Click **Test Connection**.

   The tool should display a message that the selected scanner is available for scanning.
5. Click **OK** and then click **Exit**.

If you are using Windows Vista and you use ScanGear Tool to change to a different scanner, you must select the driver again in the Administration console. You do this on the Status tab in the Manage ScanStation Client pane.

Installing HP Driver for ScanStation 1.2

The ScanStation uses the HP Driver for ScanStation 1.2 to get input from a supported HP MFP. You must install and configure it before licensing the device.

To set up a ScanStation to use the HP Driver for ScanStation, you perform the following tasks:

- Install the application, ShareScanOP_Driver_for_HP.exe, on the ScanStation (see page 20).
- Install Java Archive (JAR) files on the Java™-enabled Hewlett-Packard (HP) device that is connected to the ScanStation (see page 20). The HP Driver for ScanStation installs two sets of JAR files on the ScanStation, one set in the Chai2 folder (for older devices) and one set in the Chai4 folder (for newer devices) (see Table 1).

TABLE 1. JAR files for supported HP MFPs

HP MFP	Chai2 folder	Chai4 folder
HP LaserJet 4345	Yes	No
HP LaserJet 4730	Yes	No
HP LaserJet 9040	Yes	No
HP LaserJet 9050	Yes	No
HP LaserJet 9500	Yes	No
HP Digital Sender 9200c	Yes	No
HP LaserJet M3035	No	Yes
HP LaserJet M4345	No	Yes
HP LaserJet M5035	No	Yes

- Configure the HP device (see page 24).
- Associate the HP Driver with the HP device using the HP Driver for ScanStation Tool (see page 25).
- License the ScanStation (see page 36).

Installing the HP Driver on the ScanStation

The driver is provided on Disk 2 of the ShareScan CD.

To install the HP Driver:

1. Insert the eCopy ShareScan CD (Disk 2) in the drive.
2. Open the HP folder and then open the folder for the driver that you want to install.
3. Run the installation program, ShareScanOP_Driver_for_HP.exe, following the instructions on the screen.

   The installation program installs the driver files in the following location:

   `C:\Program Files\eCopy\HP Driver for ScanStation 1.2`
4. When the installation is complete, click **Finish**.

Installing the JAR files on the HP MFP

You can use either of the following programs to install the JAR files:

- HP Web Jetadmin (see page 20)
- HP's Package Loader utility (see page 22)

If you plan to use HP Web Jetadmin, download the software from the HP Web site and install it before installing the JAR files.

To install the JAR files (using HP Web Jetadmin):

1. To run HP Web Jetadmin:
   - Open a Web browser.
   - In the **Address** bar, enter Web Jetadmin address information using the following format .

     Format: `http://servername:port/`

     Example: `http://MFP01:8000/`
   - Press ENTER.

     If the **Security Alert** window opens, click **Yes** to proceed.
   - Log on to Web Jetadmin.

     The **Setup Wizard** page opens.

2 To select the device on which you want to install the JAR files:

- In the **Navigation** section, expand the **HP Web Jetadmin**, **Device Management**, and **Device Lists** folders by clicking the plus sign (+) next to each.
- Under **Device Lists**, select **All Devices**.

  The **Device List** pane displays the available MFPs.

  If the device you want to use is not listed, enter the device's IP address in the **Quick Device Find** field and then click **Go**. The **Device Status** page appears. Click **All Devices**; the list now includes the new device.
- Select the device that you want to use.

3 To upload the JAR files:

- In the **Device Tools** list, select **Application Manager**.

  The **Activity Log** appears.
- In the **Toolbox** section, under **Device Tools**, click **Install**.

  The Application Manager displays a list of applications that are currently installed on the selected device.
- Scroll to the **Upload Device Application** section at the bottom of the page.
- Click **Browse** and navigate to the JAR files for HP folder, which is located in the HP Driver for ScanStation 1.2 folder.
- Open the Chai2 or the Chai4 folder, depending on the target device (see Table 1).
- Select the hp_sdc-xlD-FI_1.0.7.1.jar file or the hp-ext-20-sdc.1.0.8.5.jar file, depending on the folder you opened. Click **Open** and then click **Upload** file.

  The **HP Express Loader** application now appears in the list.
- Click **Browse** again and navigate to the JAR files for HP folder.
- Select the sharescanop.jar file, click **Open**, and then click **Upload** file.

  The **HPAgent** application now appears in the list.

4 To install the JAR files:

- Select the check box for **HP Express Loader**, scroll to the bottom of the page, and then click **Install**.

> **Important!** The MFP will restart after the application is installed. You must wait for the device to complete its startup cycle; this may take several minutes. When the Install Device Applications page indicates that the application has been successfully installed and when the MFP has completed its startup cycle, you can install the next JAR file.

- In the **Toolbox** section of the **Activity Log** page, under **Device Tools**, click **Install**. Select the check box for **HPAgent**, scroll to the bottom of the page, and then click **Install**.

5 In the **Toolbox** section, under **Device Tools**, click **List**. Make sure that both applications — HPAgent and Simple Document Capture (SDC) — are included in the list.

To install the JAR files (using Package Loader):

1 To connect to the HP device:

- Open a Web browser.
- In the **Address** bar, enter device information using the following format:

  Format: `http: //<device_name or IP_address>/hp/device/this.loader`

  Example: `http://10.10.12.241/hp/device/this.loader`

- Press ENTER
- Log on to the device.

  The **Package Loader** page opens.

2 Check to see whether the JAR files have already been installed; it is important not to install a JAR file that is already installed on the device.

- Navigate to the **Reloadable Packages** section of the page. This section lists all the installed packages.
- If **ShareScan OP** (for Chai2 devices) or **HPAgent** (for Chai4 devices) and **Simple Document Capture (SDC)** are listed in the **Package Name** column, the JAR files have been installed. You can now associate the driver with the device (see page 25).

  If the packages are not listed, proceed to the next step.

3 To install the hp_sdc-xlD-FI_1.0.7.1.jar or the hp-ext-20-sdc.1.0.8.5.jar file:

Note: You must always install this file before installing the sharescanop.jar file.

- If the device's control panel is displaying a status message from the HP driver for ScanStation application, press the Home icon to return to the main panel.
- Scroll to the **Install New Package** section.
- Next to the **Enter Package File** field, click **Browse** and navigate to the JAR files for HP folder, which is located in the HP Driver for ScanStation 1.2 folder.
- Open the Chai2 or the Chai4 folder (see Table 1).
- Select the hp_sdc-xlD-FI_1.0.7.1.jar file or the hp-ext-20-sdc.1.0.8.5.jar file. Click **Open** and then click **Load Package Now**.

Important! The MFP will restart after the application is installed. You must wait for the device to complete its startup cycle; this may take several minutes. When the Package Loader page indicates that the JAR file has been successfully loaded and when the MFP has completed its startup cycle, you can install the next JAR file.

The **Simple Document Capture (SDC)** application now appears in the **Reloadable Packages** list.

4 To install the sharescanop.jar file:

- Next to the **Enter Package File** field, click **Browse** and navigate to the JAR files for HP folder.
- Open the Chai2 or the Chai4 folder.
- Select the sharescanop.jar file, click **Open**, and then click **Load Package Now**.

  When the Package Loader page displays a message indicating that the JAR file has been loaded, click **Loader Home**.
- The **ShareScan** (for Chai2 devices) or the **HP Agent** (for Chai4 devices) application now appears in the list and on the device's control panel.

Configuring the HP MFP

This section applies only to devices using the Chai4 JAR files. You configure the device on the Configure page.

To configure the device:

1. Open a Web browser.
2. In the **Address** bar, enter device information using the following format:

   Format: `http://device_name or IP_address/hp/device/ecopy.agent`

   Example: `http://10.10.12.241/hp/device/ecopy.agent`

   The **eCopy HP Driver for ScanStation v2.0.0** page opens.
3. Click **Configure**.
4. In the **Maximum Paper Size** field, select the maximum paper size that your device supports. For example, you can select **A3/Ledger** if your device supports page sizes up to **A3/Ledger**. The default size, **A4/Letter**, is smaller than **A3/Ledger**.
5. In the **Tracing** field, select **On** if you want to enable this function. Be aware that enabling tracing will slow down overall device performance.
6. Click **Submit**.

Associating the HP Driver for ScanStation with the MFP

You use the HP Driver for ScanStation Tool to associate the application with the HP MFP.

To associate the HP Driver with the MFP:

1. Select **Start** > **Programs** > **eCopy Applications** > **HP Driver for ScanStation 1.2** > **HP Driver for ScanStation Tool**.

   The **HP Driver for ScanStation Tool** window opens.

2. In the **Device** area, enter the host name of the device or enter the IP address of the device.
3. Type in the port number, if necessary, or leave the default port number (recommended).

   Note: The port number specified in the window must match the port number specified in the Port field on the Configure page for the HP MFP (see page 24).

4. Click **Test Connection**.
   - If the tool displays a message indicating that the scanner is available, click **OK**.
   - If the tool displays a message indicating that the scanner is not connected to the specified device, click **OK**, and then resolve the problem. For example, make sure that the device is running or that you entered the correct host name or IP address.
5. Click **OK** to save the settings.

   You are now ready to license the ScanStation (see page 36).

Installing the Konica Minolta TWAIN driver

The ScanStation uses a TWAIN driver to get input from the device. You must install and configure the driver before licensing the device.

You can use Konica Minolta's TWAIN driver Ver. 2.

To install the driver:

1. Open a Web browser.
2. Go to www.mykonicaminolta.com.

   The **Login** page opens.
3. Log in.
4. Download the special Konica Minolta TWAIN driver for use with your ScanStation and your Konica Minolta bizhub device.
5. Install the driver, following the instructions provided with it.

Installing a Ricoh TWAIN driver

The ScanStation uses a TWAIN driver to get input from the device. You must install and configure the driver before licensing the device.

Version 4.0 Ricoh TWAIN drivers include a Network Connection Tool. When you have multiple devices of the same model type, you use the tool to select the specific device on your network that you want to use with the driver. If you are using a version 3.0 Ricoh TWAIN driver, your system will automatically connect to the first device that it finds on your network that uses the driver.

To install the driver:

1. Insert the eCopy ShareScan CD (Disk 2) in the drive. (You can also look for drivers on your network or download them from the Internet.)
2. Open the Ricoh folder and then open the folder for the driver that you want to install.
3. Run the installation program, following the instructions on the screen.
4. When the installation is complete, click **Finish**.

To configure the driver:

1. Select **Start** > **Programs** > <*driver_name*> > **Network Connection Tool**.
2. Selec the **Use a specific scanner** check box.
3. Click **Search Scanner**.

   The **Search Scanner: Result** window lists all devices on the network that can use the curent TWAIN driver.
4. Select the scanner that you want to use and then click **OK**.

   The **Network Connection Tool** window opens.
5. Click **OK**.

Installing a TWAIN or ISIS driver

The ScanStation can use a TWAIN or ISIS driver to get input from the scanner. You must install and configure the driver before licensing the device.

Drivers are typically included with scanners. However, you may need to update the driver in the following circumstances:

- The driver version included with the scanner may not be the most current version.
- You are installing an ISIS scanner driver on a computer running Windows Vista.

eCopy recommends that you go to the scanner vendor's Web site to verify that you have the latest available driver and, if necessary, download the driver, install it on the ScanStation, and then configure it as needed. You can check driver versions at www.scannerdrivers.com.

eCopy provides the support files that ShareScan needs to work with ISIS drivers. Before installing the support files, you must install ShareScan (see page 34).

To install the ISIS support files:

1. Double-click the ShareScanIsis_8_0.exe application, which is located on the Scanners installation CD.

   The WinZip Self-Extractor window displays the default path, C:\.

2. Click **Unzip**.

   The files are copied to the PIXTRAN and system32 folders in the WINDOWS folder.

Installing the Sharp OSA™ TWAIN Driver

The ScanStation uses a TWAIN driver to get input from the device. You must install and configure the driver before licensing the device.

The eCopy Sharp OSA TWAIN driver provides TWAIN support for Sharp OSA™-enabled MFPs.

Before installing the driver, you must install the Sun Microsystems™ Java™ 2 Platform Standard Edition Development Kit 5.0, update 10 or later. You can download the update from the Sun Web site: http://java.sun.com/javase/downloads/index_jdk5.jsp. When you install the JDK, accept the default settings.

To install the driver:

1. Insert the eCopy ShareScan CD (Disk 2) in the drive.
2. Open the Sharp OSA TWAIN folder and then open the folder for the driver that you want to install.
3. Run the installation program, ShareScanOP_Driver_for_Sharp.exe, following the instructions on the screen.

   The installation program installs the driver in the following location:

   ```
   C:\Program Files\eCopy\TWAIN Driver for Sharp OSA
   ```
4. When the installation is complete, click **Finish**.

To register the ScanStation application:

1. Open a Web browser.
2. In the **Address** bar, enter the name or the IP address of the Sharp device and then press ENTER.

   The **Top Page** appears.
3. In the navigation pane, select **Application Settings** and then select **External Application Settings**.

   The **Login** page appears.
4. Enter the login name and password and then click **Login**.

   The **Standard Application Settings** page appears.
5. Click **Add**.

   The **Standard Application Registration** page appears.
6. Enter the registration settings for the application:
   - **Application Name:** Enter a descriptive name, such as “eCopy Scans”.

- **Address for Application:** Enter the URL using the following format, where the port number and "scanstation" are required elements:

  `http://<IP_Address>:8080/scanstation/`

- **Timeout:** Enter a timeout value for the device.

7 Click **Submit**.

The **Standard Application Settings** page now lists the application you registered.

To configure the driver:

1 Select **Start** > **Programs** > **eCopy Applications** > **eCopy Sharp OSA TWAIN Driver** > **Driver Configuration Tool**.

The **eCopy Sharp TWAIN Driver Tool** window opens.

2 In the **Device** area, enter the host name or the IP Address of the Sharp device.

3 In the **Web Server** area, enter the IP address or the host name of the ScanStation.

4 Type in the port number, if necessary, or leave the default port number (recommended).

> **Note:** The port number specified in the window must match the port number specified in the Address for Application field on the Standard Application Registration page.

5 At the Sharp device, select **Document Filing** on the control panel and then select the newly registered application on the touch screen.

The **eCopy TWAIN Driver** screen appears.

6 Click **Test Connection**.

If the tool displays a message indicating that it found the service on the specified device, click **OK**.

If the tool displays a message indicating that it did not find the service on the specified device, click **OK** and then resolve the problem.

7 Click **OK** to save the settings.

Installing the Toshiba TWAIN driver

The ScanStation uses a TWAIN driver to get input from the device. You must install and configure the driver before licensing the device.

You can use Toshiba's e-STUDIO Series Remote Scan TWAIN driver.

To install the driver:

1. Insert the eCopy ShareScan CD (Disk 2) in the drive.
2. Open the Toshiba folder and then open the TWAIN folder.
3. For information about obtaining the required Toshiba driver and firmware, refer to the Readme.txt file.
4. Install the driver and firmware, following the instructions provided with them.

Installing the Xerox Driver for ScanStation

The ScanStation uses a TWAIN driver to get input from the device. You must install and configure the driver before licensing the device.

Before installing the driver, you must install the Sun Microsystems™ Java™ 2 Platform Standard Edition Development Kit 5.0, update 10 or later. You can download the update from the Sun Web site: http://java.sun.com/javase/downloads/index_jdk5.jsp. When you install the JDK, accept the default settings.

To install the driver:

1. Insert the eCopy ShareScan CD (Disk 2) in the drive.
2. Open the Xerox_TWAIN_Driver folder.
3. Run the installation program, ShareScanOP_Driver_for_XEROX.exe, following the instructions on the screen.

   The program installs the driver in the following location:

   ```
   C:\Program Files\eCopy\Xerox Driver for ScanStation
   ```
4. When the installation is complete, click **Finish**.

To configure the driver:

1. Select **Start** > **Programs** > **eCopy Applications** > **Xerox Driver for ScanStation** > **Xerox Driver Configuration Tool**.

   The **Xerox Driver for ScanStation Configuration** window opens.
2. On the **Device** tab, enter the host name or the IP Address of the Xerox device in the **IP Address** field.
3. In the **User Name** and **Password** fields, enter the user name and password for the device administrator.
4. Select the **Capabilities** tab and then specify the color capability of the device and whether the device supports A3/Ledger size paper.
5. When you are finished configuring the driver, click **Save**.

Installing the Océ Imagistics Driver

The ScanStation uses a TWAIN driver to get input from the device. You must install and configure the driver before licensing the device.

To install the driver:

1

Installing eCopy ShareScan

Use the ShareScan installation program to install the following components on a network computer:

- Client
- Services Manager
- Administration console
- One or more eCopy Connectors supplied with the installation program.

Installing connectors is not the same as activating them. You can install all the connectors suitable to your environment now and activate them when you need to use them. For example, if you are in a Windows environment, you do not need to install the Lotus Notes Mail and Fax connectors. (If you want to install a connector later, you must go through the installation process again.)

To install the software:

1. Insert the eCopy ShareScan CD (Disk 1) in the drive.

   The **Launch** window opens,

2. Click **Install ShareScan**.
3. Select the language for the installation and then click **OK**.

   The **Welcome** window opens.

4. Click **Next**.

   If your computer does not meet the minimum requirements, the installation program displays a system requirements message. Read the message and then click **Install** to proceed.

   The **Welcome** window opens again.

5. Click **Next**.

   The **Components** window opens.

6. Click **Next**.

   The **Connectors** window opens.

7. Select the connectors you want to install.

> **Note:** You can use the Copy Connector on some, but not all, devices running eCopy ShareScan Embedded software. If you try to activate a Copy connector profile on an unsupported device, the system will display an error message. You can use the Fax via Print Connector only on a ScanStation.

8 Click **Next**.

You must install the Lotus Notes client before you can install the Lotus Notes e-mail or fax connector. The Lotus Notes e-mail and fax connectors will not be available for installation unless the Lotus Notes client is installed on the computer running the Services Manager.

If the Lotus Notes client installation program prompts you to choose between the Multi-User Install option and the Single User Install option, make sure that you select the Single User Intall option.

9 Click **OK** to continue the installation.

If you selected an e-mail or fax connector, the **Internet Address Book Support** window opens.

- If you do not plan to install the address book on this computer, select **No** and then click **Next**.
- If you plan to install the address book on this computer, select **Yes** and then click **Next**.

  The system checks for the required components, it does not install SQL Express.

Note: ShareScan uses Microsoft SQL Server Express 2005 (SQL Express) to store manually entered addresses and fax numbers in a database. If you plan to use this function, you must install the version of SQL Express provided on the ShareScan CD (see page 161).

10 When the installation is complete, click **OK** to return to the **Launch** window.

11 Select **Optional Components > Install SQL Express** and, when prompted, enter a password.

You will use the password when you configure the connector profiles from the Administration console. The password must contain a minimum of 6 characters and must include alpha and numeric characters.

12 Follow the prompts provided by the Microsoft SQL Server 2005 Setup program and accept all of the default settings.

13 When the installation is complete, click **Finish**.

Licensing devices

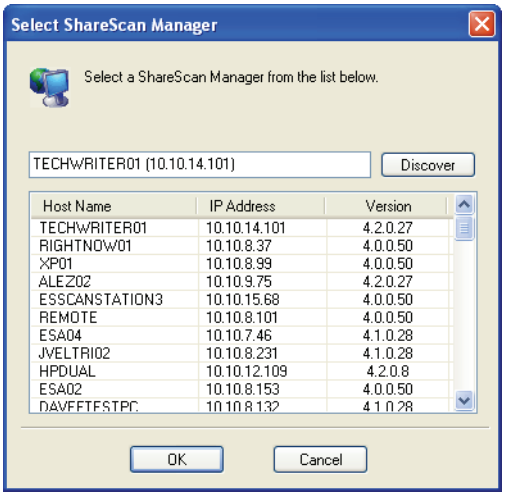
You license the product from the Administration console. To do this, you perform the following tasks:

- Select a Services Manager (see page 37).
- Add the product key to the local license database.
- Add an eCopy-enabled device to the Services Manager.
- Activate the license and generate a license report (see page 61).
- Set up a supported multifunction peripheral (MFP) that you plan to use with the ScanStation's Send to eCopy feature (see page 95).

To select a Services Manager:

1 Select **Start** > **Programs** > **eCopy Applications** > **ShareScan Administration**.

The **Select ShareScan Manager** window opens. The first Services Manager in the list is most often the local computer, the one that you typically want to administer.

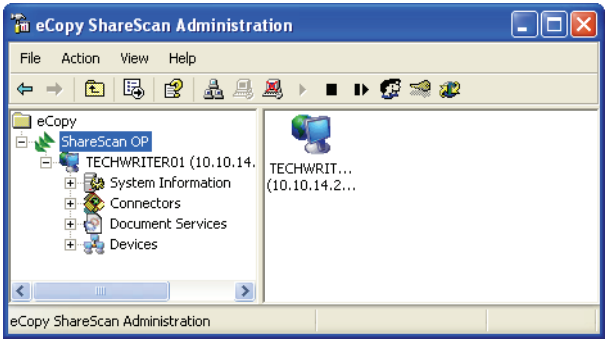


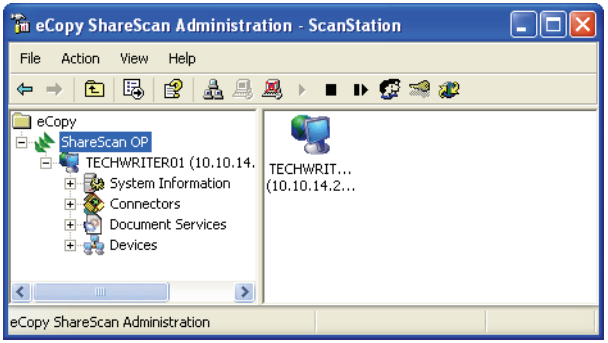
2 In the list, select the Services Manager that you want to use.

- If the Services Manager that you want to use is not listed, click **Discover** to refresh the list.
- If the Services Manager is still not listed, enter the machine name and IP address in the edit field, for example, enter **ECOPY1 (10.10.10.10)**.

3 Click **OK**.

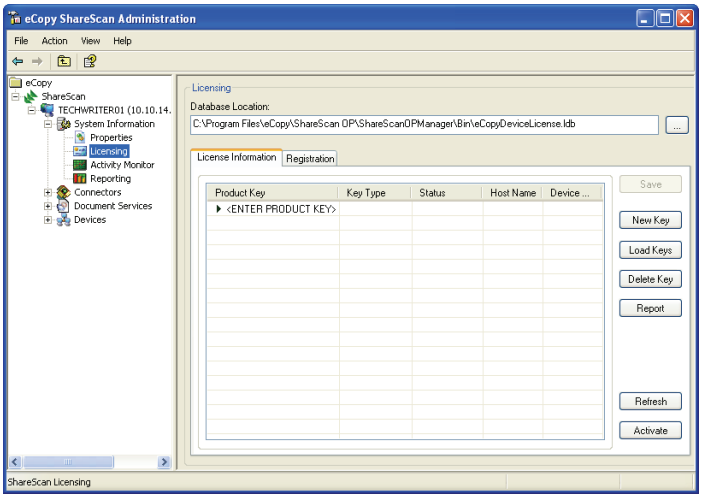
The Administration console opens.





To add the product key to the local license database:

1 In the console tree, select **System Information** and then select **Licensing**.



Note: If you received your keys in electronic form, you may want to copy and paste them from a text file (TXT).

2 Use any of the following methods:

- Click **New Key**, enter the key (manually or by pasting a copied key), and then click **OK**.
- Click **<ENTER PRODUCT KEY>** to make the edit field active, enter the product key in the field, and then press ENTER.
- Click **Load Keys**, select the text file containing the produt keys, and then click **Open**.

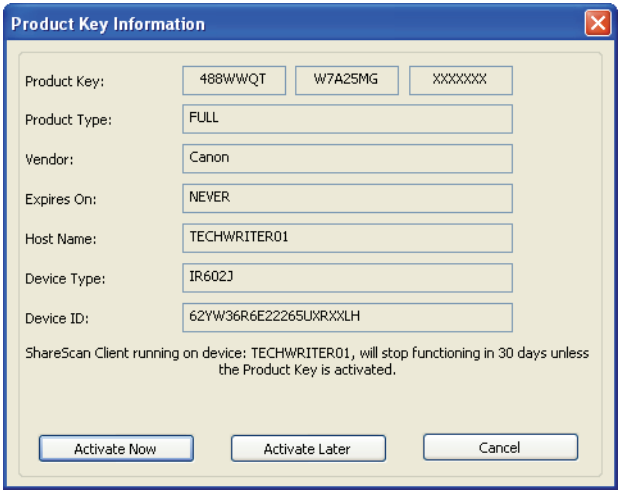
The **License Information** tab displays the product key or keys that you entered.

To add an eCopy-enabled device to the Services Manager:

1. Make sure that the device that you want to license is running.
2. In the console tree, right-click **Devices** and then select **Add a new device**.

   The **Add Device** window lists all available devices. The window displays IP Address information, the name of the device, the software version, the Services Manager that is currently managing the device, and the domain.
3. Select the device that you want to license and then click **OK**.
4. When the system prompts you to confirm the device that you want to add to the device list, click **Yes**.

   The system displays the product key information.



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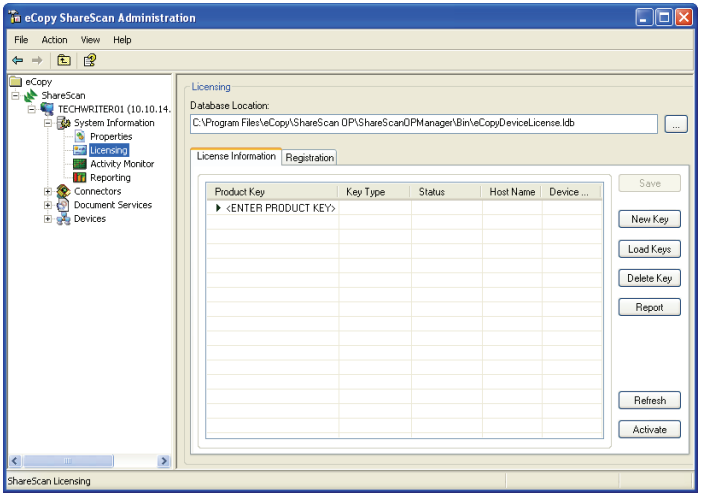
1 In the console tree, select **System Information** and then select **Licensing**.



Note: If you received your keys in electronic form, you may want to copy and paste them from a text file (TXT).

2 Use any of the following methods:

- Click **New Key**, enter the key (manually or by pasting a copied key), and then click **OK**.
- Click **<ENTER PRODUCT KEY>** to make the edit field active, enter the product key in the field, and then press ENTER.
- Click **Load Keys**, select the text file containing the produt keys, and then click **Open**.

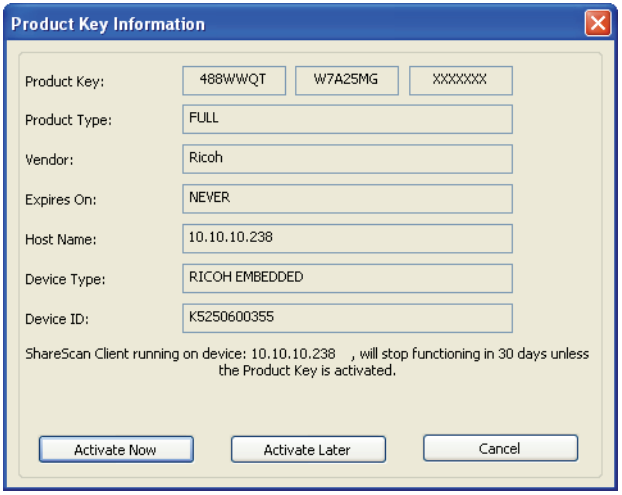
The **License Information** tab displays the product key or keys that you entered.

To add an eCopy-enabled device to the Services Manager:

1. Make sure that the device that you want to license is running.
2. In the console tree, right-click **Devices** and then select **Add a new device**.

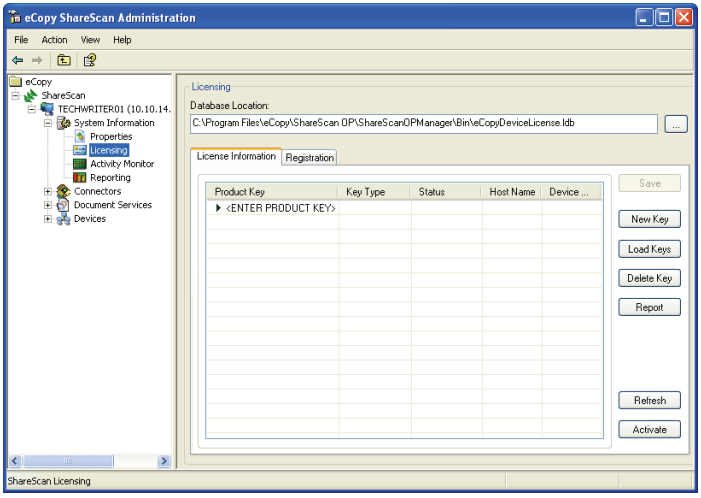
   The **Add Device** window lists all available devices. The window displays IP Address information, the name of the device, the software version, the Services Manager that is currently managing the device, and the domain.
3. Select the device that you want to license and then click **OK**.
4. When the system prompts you to confirm the device that you want to add to the device list, click **Yes**.

   The system displays the product key information.



To add the product key to the local license database:

1 In the console tree, select **System Information** and then select **Licensing**.

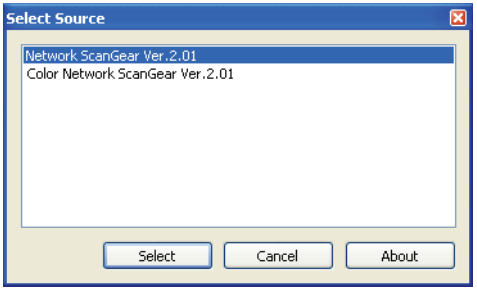


Note: If you received your keys in electronic form, you may want to copy and paste them from a text file (TXT).

2 Use either of the following methods:

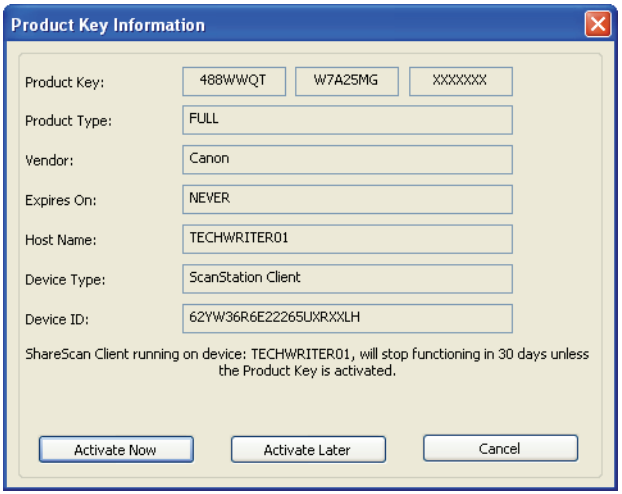
- Click **New Key**, enter the key (manually or by pasting a copied key), and then click **OK**.
- Click **<ENTER PRODUCT KEY>** to make the edit field active, enter the product key in the field, and then press ENTER.

3 When you have added the product key, the Services Manager prompts you to select the source, the TWAIN driver.



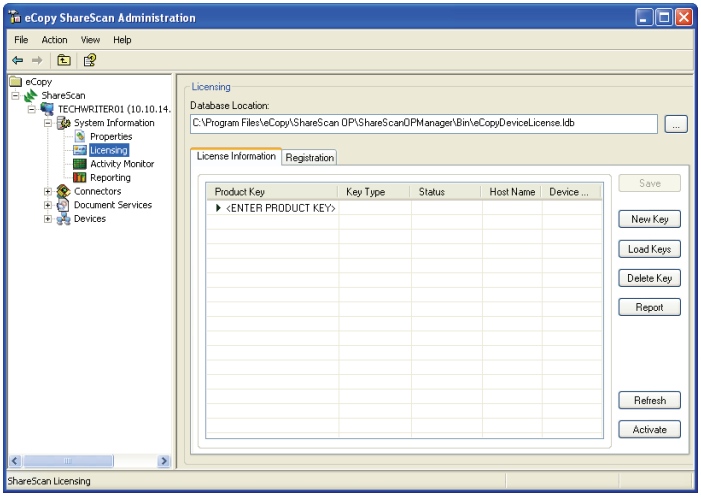
4 Select the driver and then click **Select**.

The system displays the product key information.



To add the product key to the local license database:

1 In the console tree, select **System Information** and then select **Licensing**.

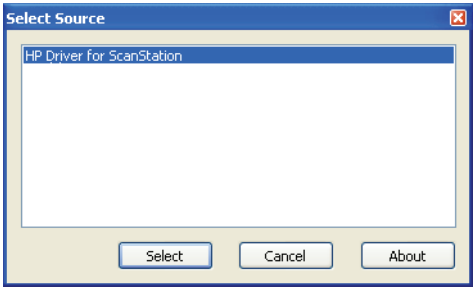


Note: If you received your keys in electronic form, you may want to copy and paste them from a text file (TXT).

2 Use any of the following methods:

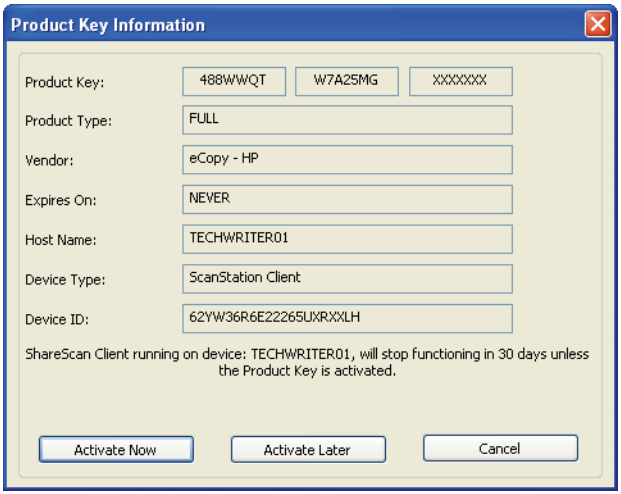
- Click **New Key**, enter the key (manually or by pasting a copied key), and then click **OK**.
- Click **<ENTER PRODUCT KEY>** to make the edit field active, enter the product key in the field, and then press ENTER.

3 When you have added the product key, the Services Manager prompts you to select the source, the TWAIN driver.



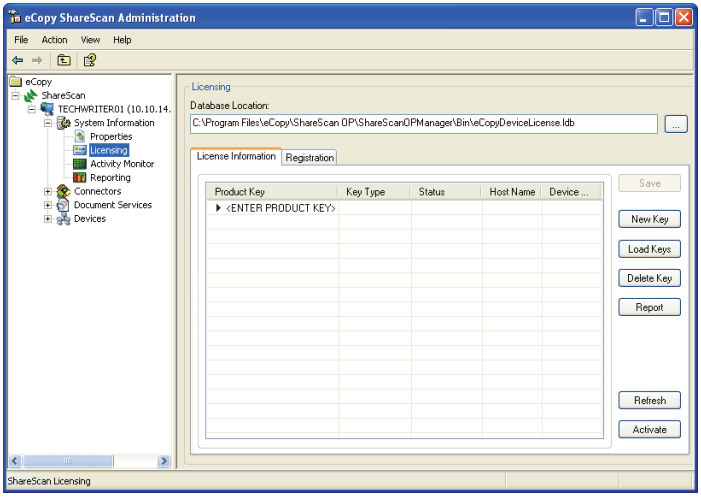
4 Select the driver and then click **Select**.

The system displays the product key information.



To add the product key to the local license database:

1 In the console tree, select **System Information** and then select **Licensing**.



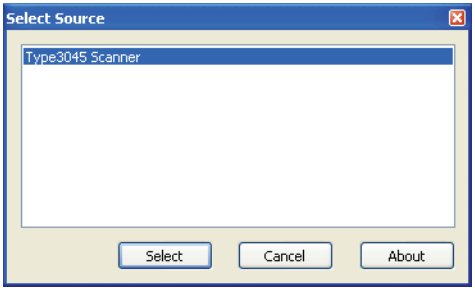
Note: If you received your keys in electronic form, you may want to copy and paste them from a text file (TXT).

2 Use either of the following methods:

- Click **New Key**, enter the key (manually or by pasting a copied key), and then click **OK**.
- Click **<ENTER PRODUCT KEY>** to make the edit field active, enter the product key in the field, and then press ENTER.

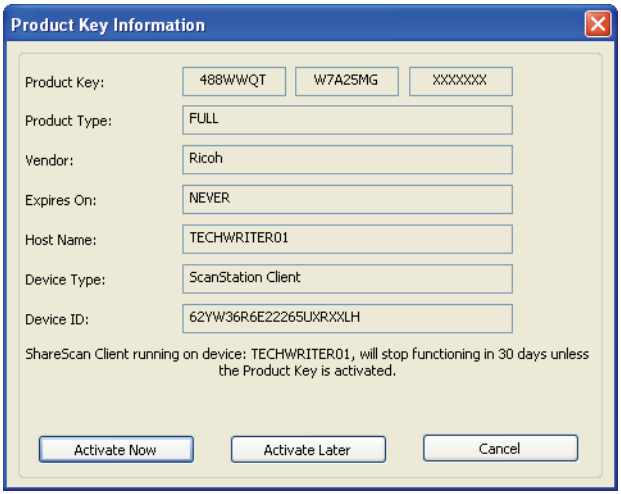
3 When you have added the product key, the Services Manager prompts you to select the source, the TWAIN driver.

If your company has multiple MFP devices that use the selected driver, the system may prompt you to select the one that you want to license.



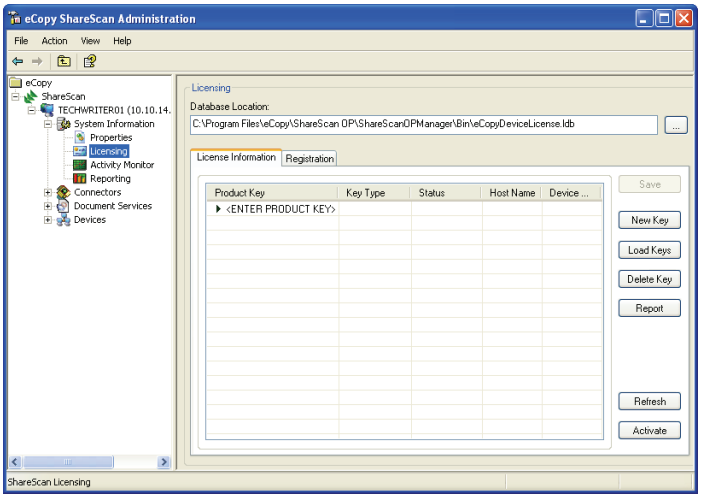
4 Select the driver and then click **Select**.

The system displays the product key information.



To add the product key to the local license database:

1 In the console tree, select **System Information** and then select **Licensing**.

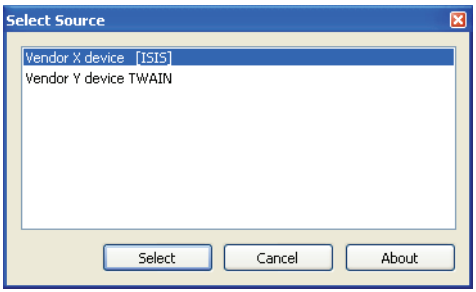


Note: If you received your keys in electronic form, you may want to copy and paste them from a text file (TXT).

2 Use either of the following methods:

- Click **New Key**, enter the key (manually or by pasting a copied key), and then click **OK**.
- Click **<ENTER PRODUCT KEY>** to make the edit field active, enter the product key in the field, and then press ENTER.

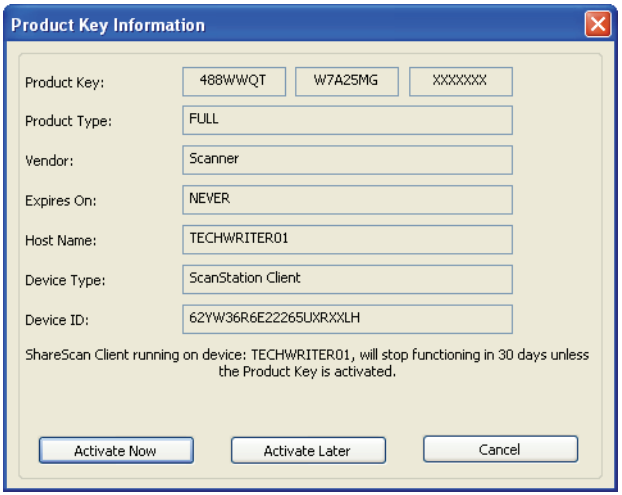
3 When you have added the product key, the Services Manager prompts you to select the source, the TWAIN or ISIS driver. If you have installed an ISIS driver, [ISIS] will appear at the end of the driver name.



4 Select the driver and then click **Select**.

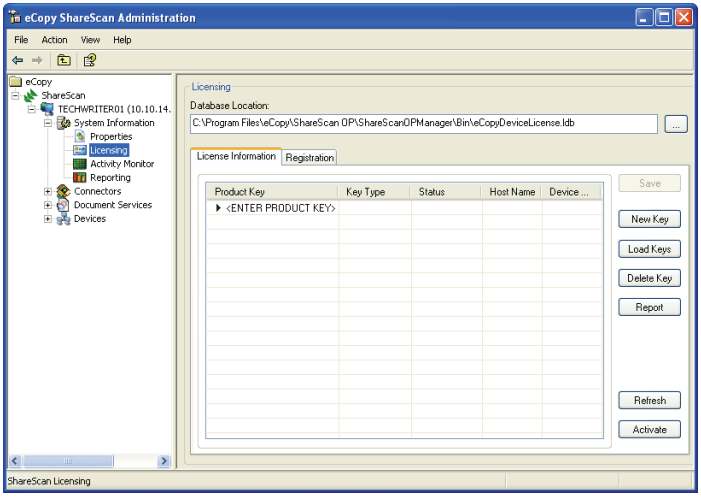
If you selected an ISIS driver, the **Configure Device Settings** window appears. After configuring the device, click **OK**.

The system displays the product key information.



To add the product key to the local license database:

1 In the console tree, select **System Information** and then select **Licensing**.



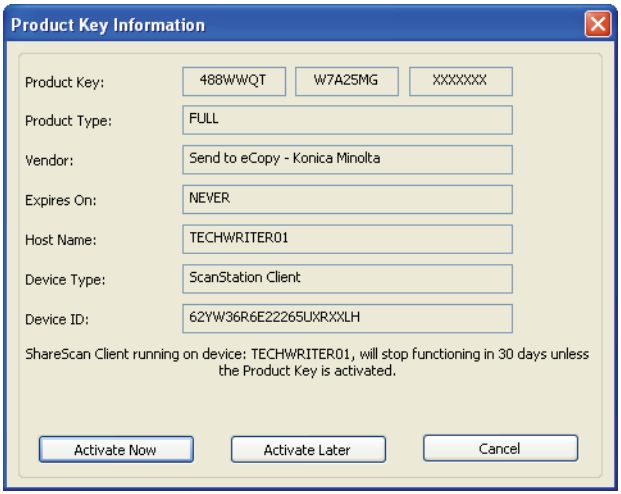
Note: If you received your keys in electronic form, you may want to copy and paste them from a text file (TXT).

2 Use either of the following methods:

- Click **New Key**, enter the key (manually or by pasting a copied key), and then click **OK**.

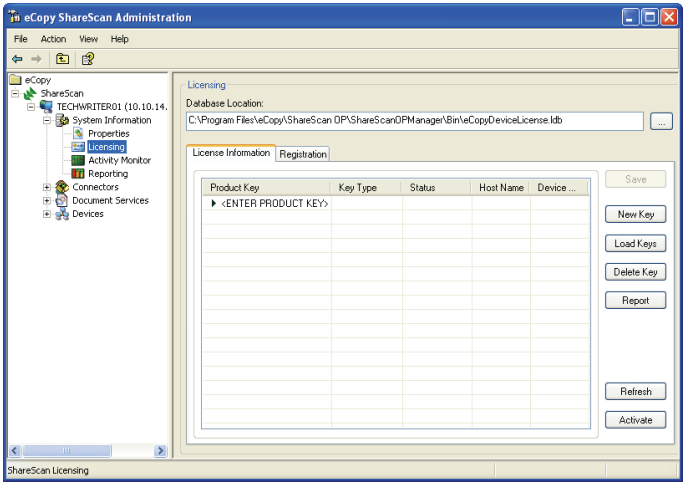
- Click <**ENTER PRODUCT KEY**> to make the edit field active, enter the product key in the field, and then press ENTER.

When you have added the product key, the **Product Key Information** window opens. You use the same Send to eCopy key to license TWAIN-enabled devices.



To add the product key to the local license database:

1 In the console tree, select **System Information** and then select **Licensing**.



Note: If you received your keys in electronic form, you may want to copy and paste them from a text file (TXT).

2 Use either of the following methods:

- Click **New Key**, enter the key (manually or by pasting a copied key), and then click **OK**.
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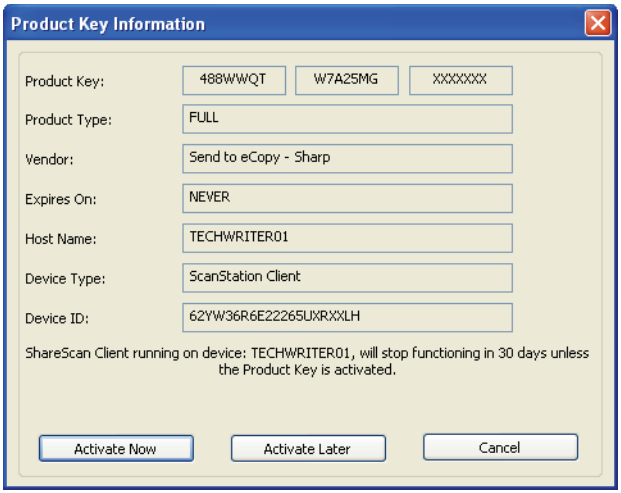
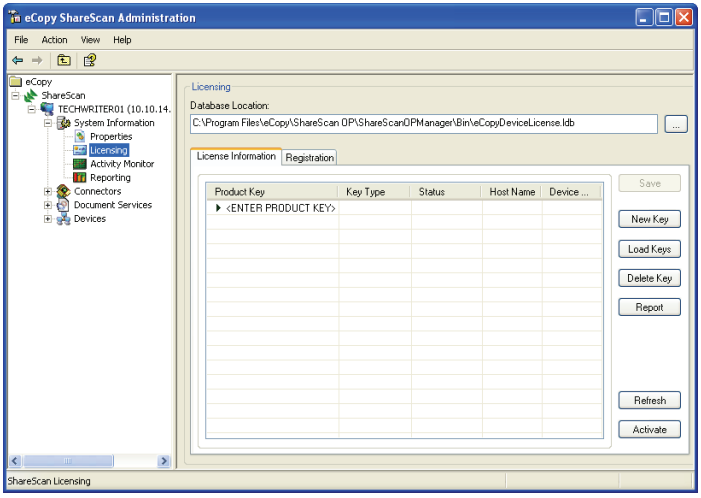


To add the product key to the local license database:

1 In the console tree, select **System Information** and then select **Licensing**.



Note: If you received your keys in electronic form, you may want to copy and paste them from a text file (TXT).

2 Use either of the following methods:

- Click **New Key**, enter the key (manually or by pasting a copied key), and then click **OK**.
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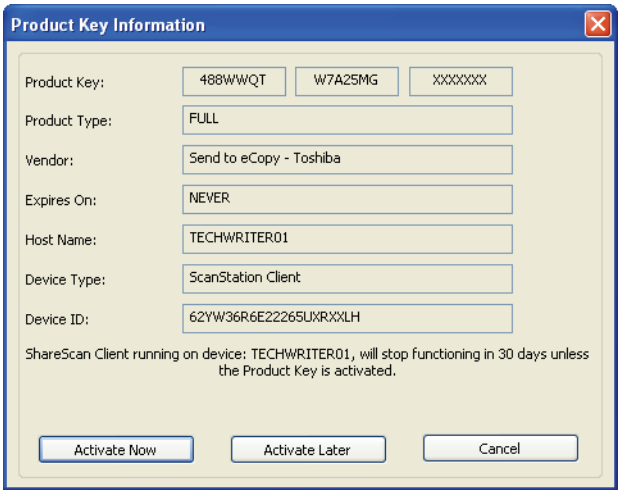
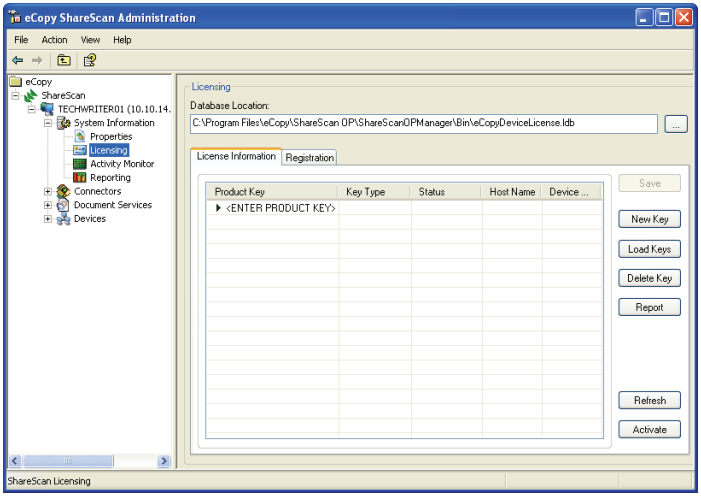
When you have added the product key, the **Product Key Information** window opens. You use the same Send to eCopy key to license TWAIN-enabled devices.



To add the product key to the local license database:

1 In the console tree, select **System Information** and then select **Licensing**.

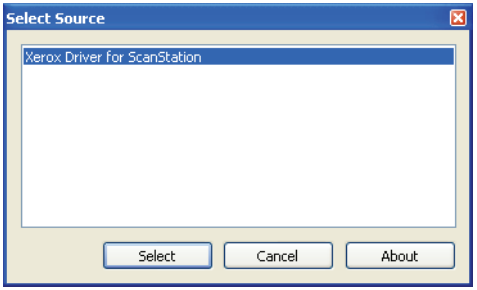


Note: If you received your keys in electronic form, you may want to copy and paste them from a text file (TXT).

2 Use either of the following methods:

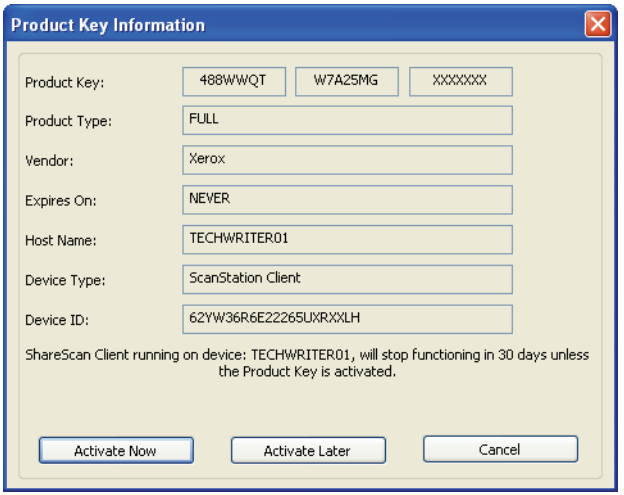
- Click **New Key**, enter the key (manually or by pasting a copied key), and then click **OK**.
- Click **<ENTER PRODUCT KEY>** to make the edit field active, enter the product key in the field, and then press ENTER.

3 When you have added the product key, the Services Manager prompts you to select the source, the TWAIN driver.



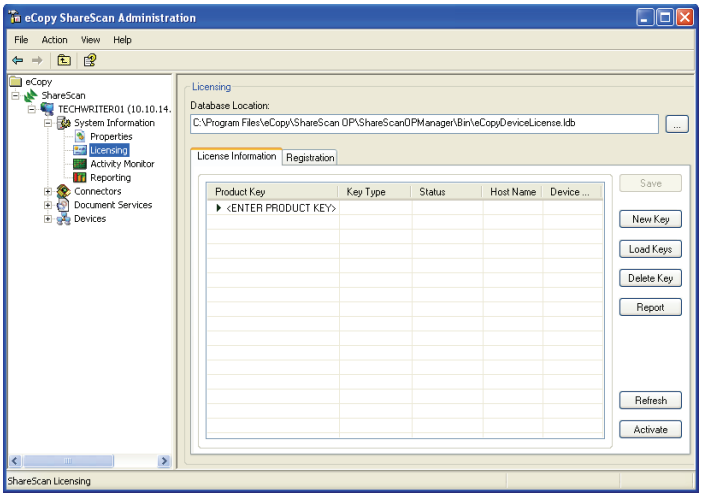
4 Select the driver and then click **Select**.

The system displays the product key information.



To add the product key to the local license database:

1 In the console tree, select **System Information** and then select **Licensing**.

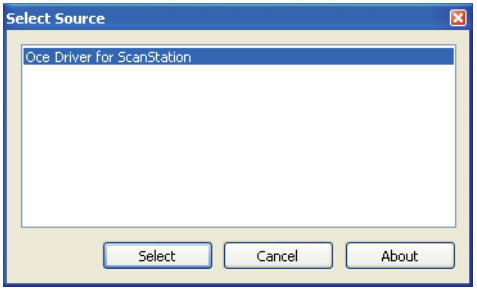


Note: If you received your keys in electronic form, you may want to copy and paste them from a text file (TXT).

2 Use either of the following methods:

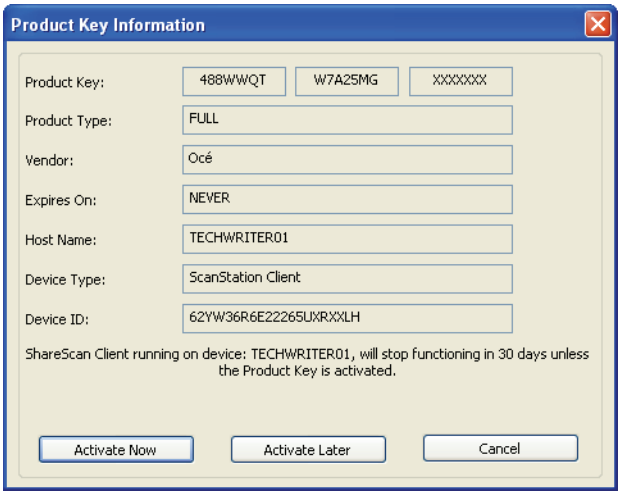
- Click **New Key**, enter the key (manually or by pasting a copied key), and then click **OK**.
- Click **<ENTER PRODUCT KEY>** to make the edit field active, enter the product key in the field, and then press ENTER.

3 When you have added the product key, the Services Manager prompts you to select the source, the TWAIN driver.



4 Select the driver and then click **Select**.

The system displays the product key information.



To activate the license and generate a report:

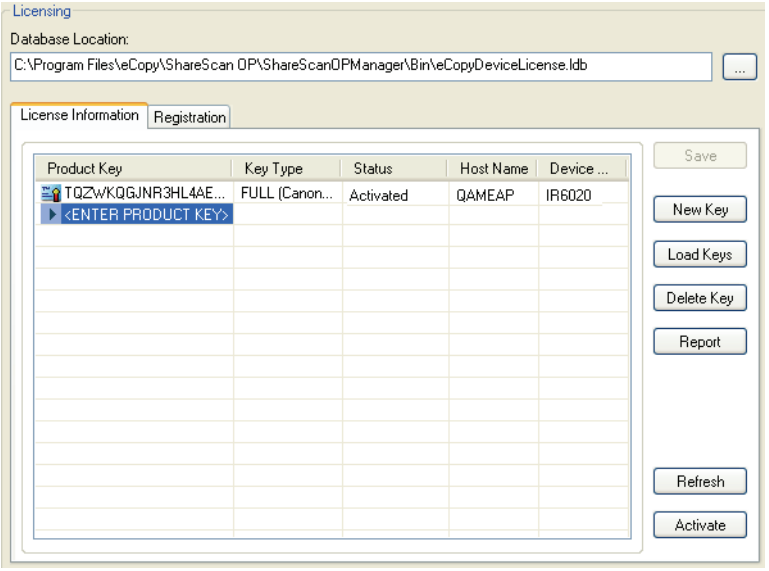
1 To activate the license through the Internet, click **Activate Now**.

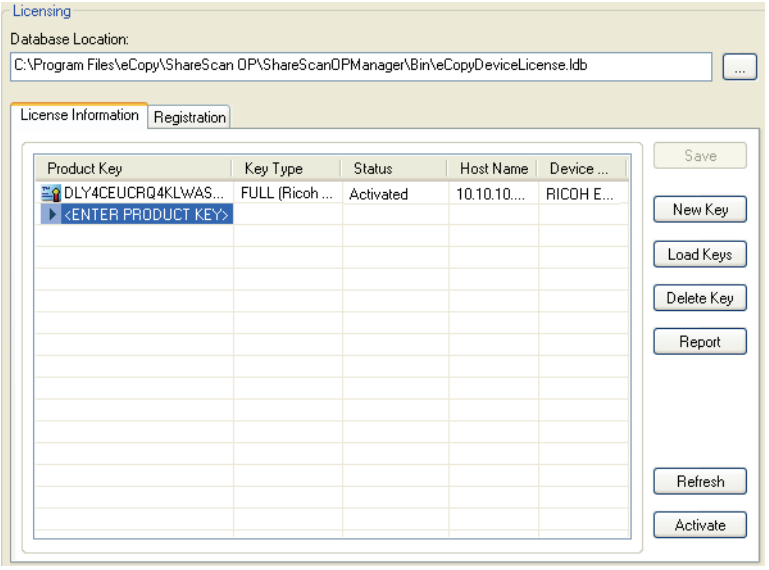
> **Note:** If you cannot activate a license immediately, you have 30 days in which to activate it.

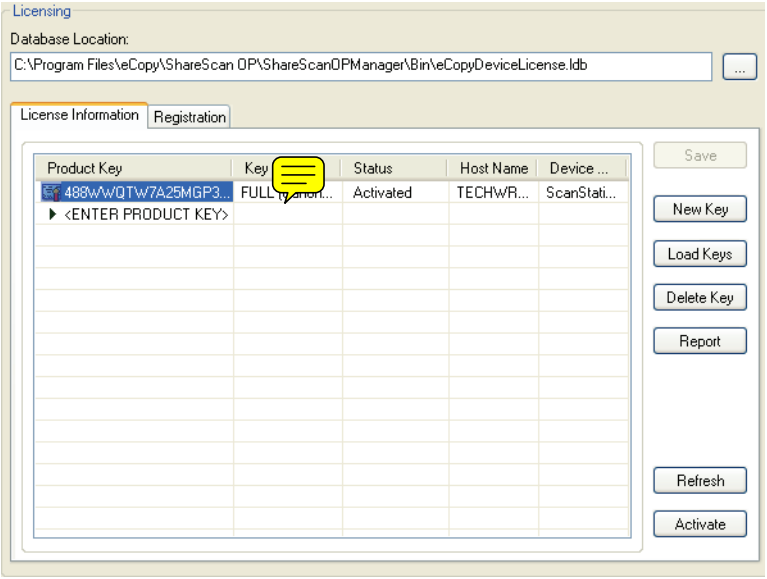
The activation process only takes a couple of minutes.

2 Read the registration message, click **OK**, and then click **Done**.

3 Click **Report** to generate a license report.



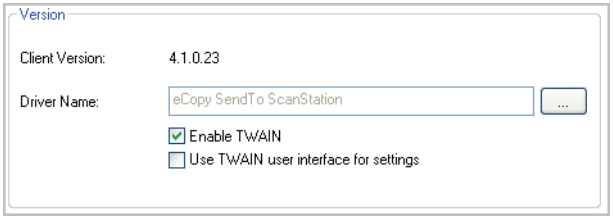




The eCopy Registration Web site enables you to upload the product key information needed to register eCopy-enabled devices from the license report. You typically complete the registration process after adding one or more product keys to the License Information pane and generating the license report. If you add more product keys later, you will need to repeat the registration process.

To enable TWAIN:

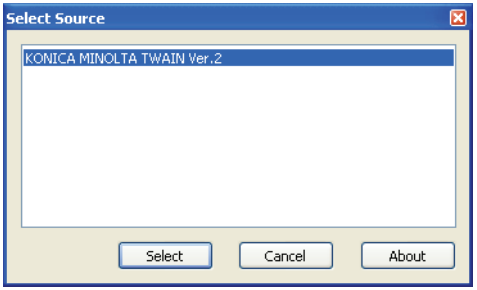
1 In the console tree, select **Devices** > <*device_name*> > **Manage** > **Status** and then select the **Enable TWAIN** check box.



2 To select the driver:

- Click the Browse button ....

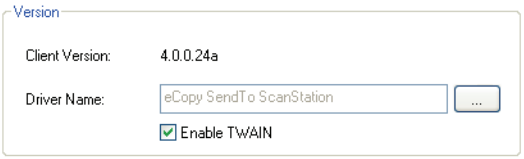
  The Services Manager prompts you to select the source, the TWAIN driver.



- Select the Konica Minolta TWAIN driver.
- In the **Manage ScanStation Client** pane, click **Save**.

To enable TWAIN:

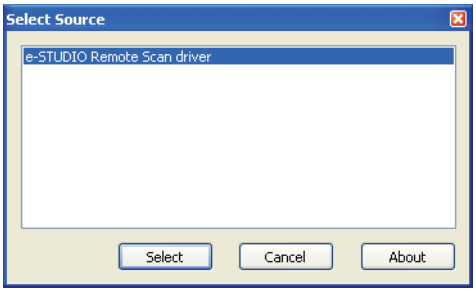
1 In the console tree, select **Devices** > <*device_name*> > **Manage** > **Status** and then select the **Enable TWAIN** check box.



2 To select the driver:

- Click the Browse button ....

  The Services Manager prompts you to select the source, the TWAIN driver.



- Select the e-STUDIO Remote Scan driver.

  The Toshiba driver's **TopAccessDocMon Local Discovery** window opens.

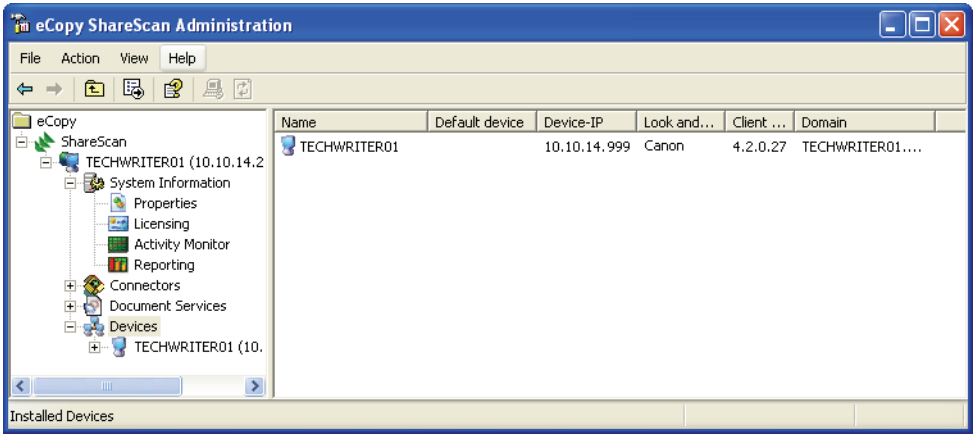
Note: To use a *different* MFP with the driver, you must uninstall the driver, restart the computer, reinstall the driver, and then select the MFP you want to use.

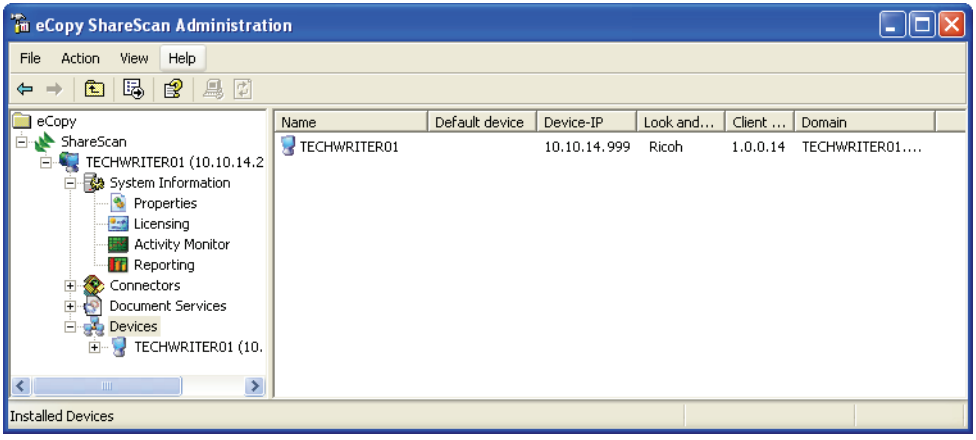
- Click **Start Discovery**, select the TWAIN-enabled device that you want to use, and then click **OK**.
- In the **Manage ScanStation Client** pane, click **Save**.

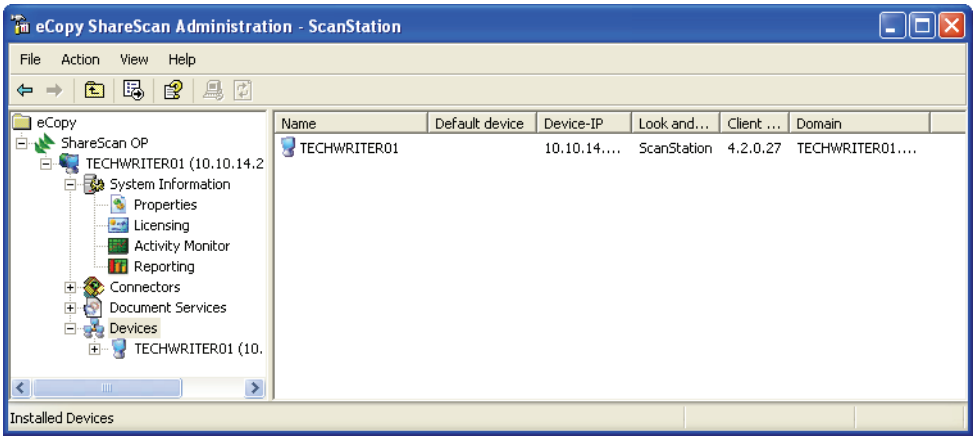
To view the device list:

1 In the console tree, select **Devices**.

The new device is listed in the right pane. (To change the view, right-click in the right pane, click **View**, and then select the desired view.)



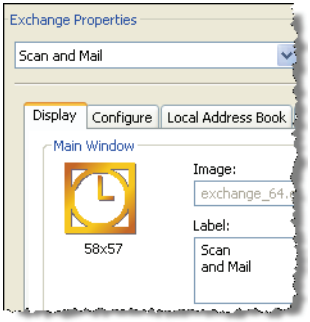


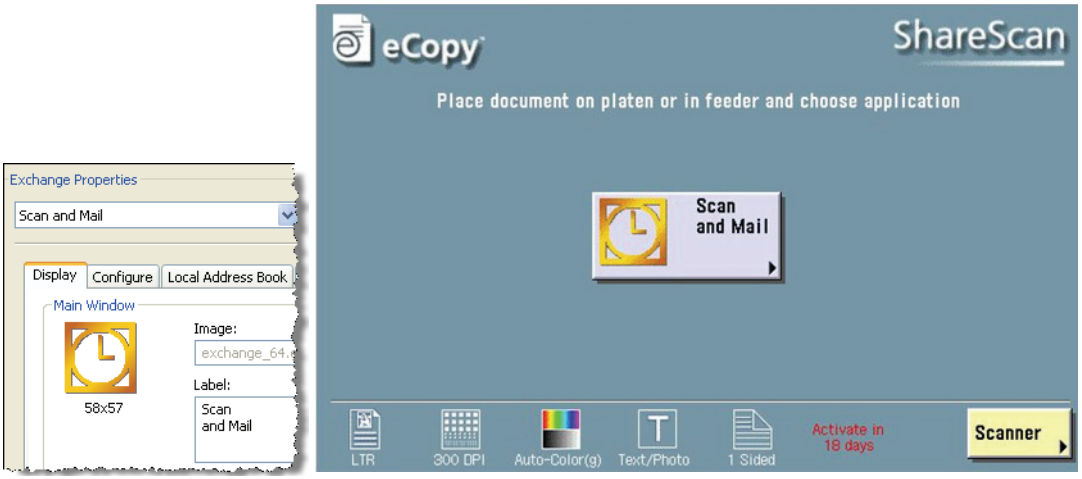

eCopy ShareScan Administration - ScanStation
File
Action
View
Help
eCopy
ShareScan OP
TECHWRITER01 (10.10.14.2
System Information
Properties
Licensing
Activity Monitor
Reporting
Connectors
Document Services
Devices
TECHWRITER01 (10.
Name
Default device
Device-IP
Look and...
Client ...
Domain
TECHWRITER01
10.10.14....
ScanStation
4.2.0.27
TECHWRITER01....
Installed Devices

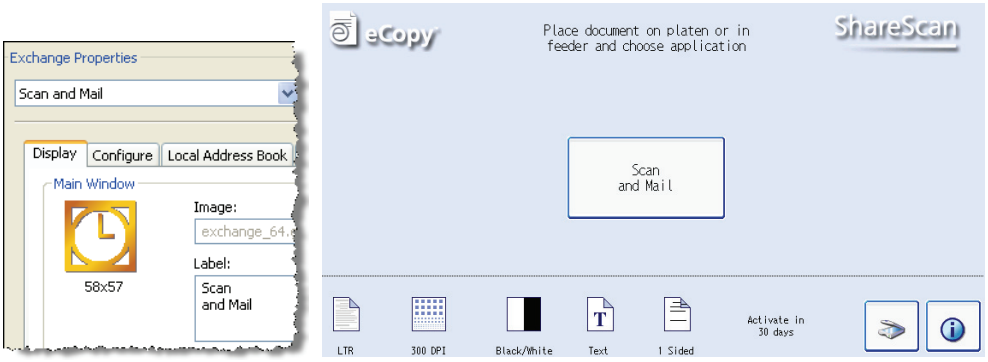
Configuring and activating connector profiles

After licensing a device, you configure one or more profiles for each connector that you want to use and then activate the profiles on a device.

When you configure a connector profile, you associate it with a button that appears on the main ShareScan Client screen. When a user presses a button, the connector uses the properties and services specified in the connector profile associated with the button. For example, the following screens illustrate the relationship between the Display properties for an Exchange connector profile and the Scan and Mail button on the Client screen.







You can configure multiple profiles for each connector and you can display up to nine buttons on the screen.

This section describes the basic process of configuring and activating a connector profile, using the eCopy Connector for Microsoft Exchange as an example. It does not provide any information about configuring a local address book, which is a more advanced function. For detailed information about configuring a profile for this connector, see page 175.

Before configuring this profile, you should create a generic Microsoft Exchange account for ShareScan to use. The profile uses the ShareScan User Account information to log on to the Exchange server and retrieve the Global Address List.

Specifying services for a connector profile

There are three core services available to connector profiles:

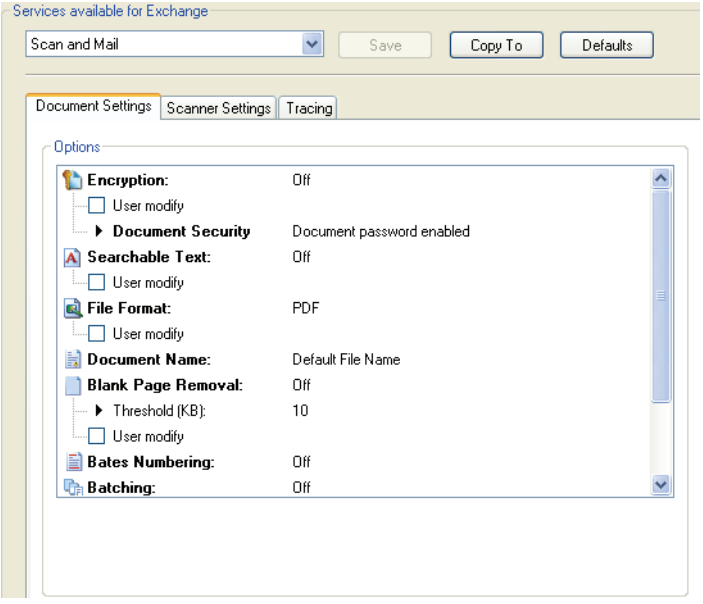
- Document Settings
- Scanner Settings
- Tracing Settings

This section describes the basic process of configuring the Document Settings and Scanner Setting services. For information about configuring Tracing Settings, see page 171.

To access the Services pane for a connector:

1. In the console tree, select **Connectors**.
2. Double-click **Exchange**.
3. Double-click **Services**.

   The **Services available for Exchange** pane appears.



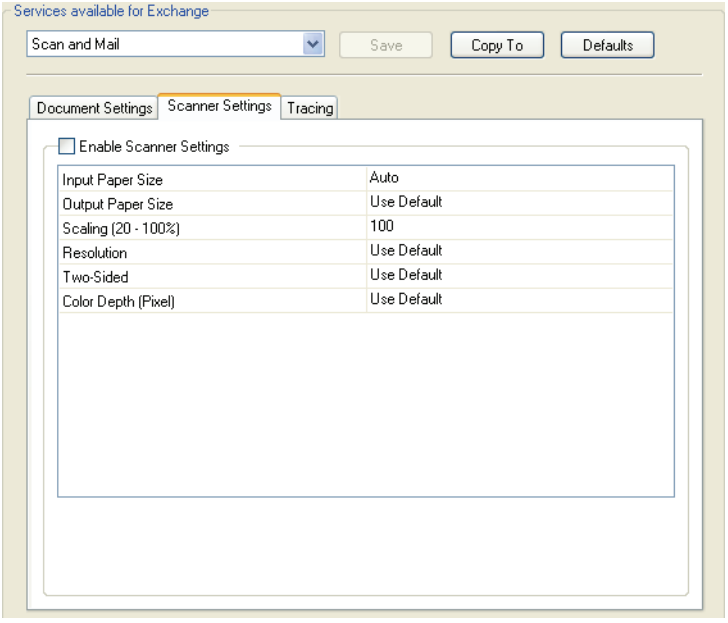
To configure the Document Settings service.

1. Select the **Document Settings** tab.
2. For each option, specify the default settings that you want available to the user at the device.

   If you want to allow the user to change the default setting for an option, select the **User modify** check box.
3. Click **Save** to save changes to the profile.

To configure the Scanner Settings service.

1. Select the **Scanner Settings** tab.
2. Select the **Enable Scanner Settings** check box.
3. For each option, specify the default settings that you want this connector profile to use. (You can create additional profiles for the same connector that use different scanner settings at the same device.)



4. Click **Save** to save changes to the profile.

Specifying properties for a connector profile

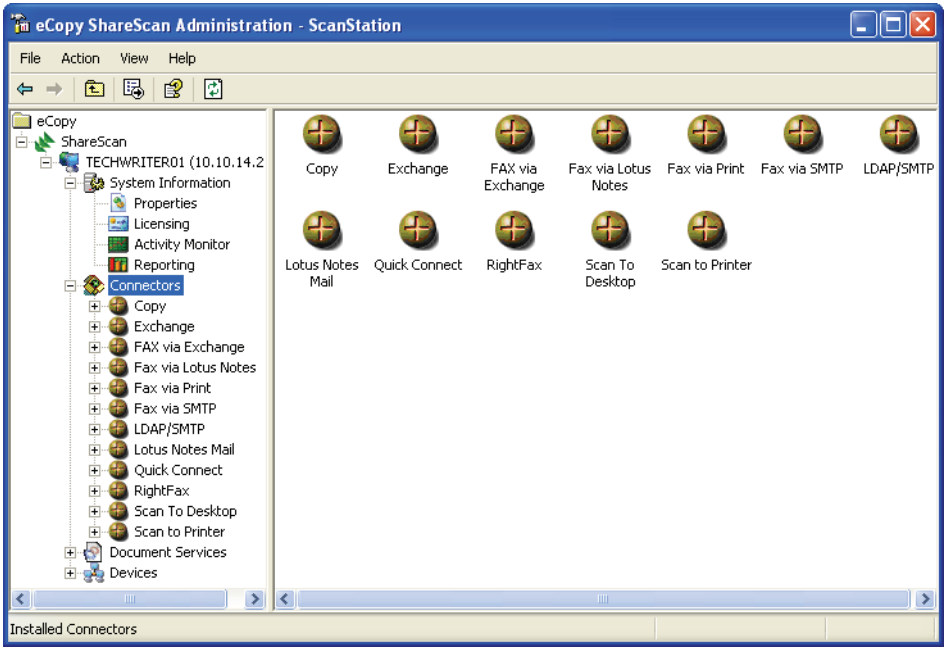
This section describes the basic process of configuring the following properties:

- Display
- ShareScan user (on the Configure tab)
- Content
- Express mode

To access the Properties tab for a connector:

1 In the console tree, select **Connectors**.

The console displays all the installed connectors. (To change the view, right-click in the right pane, click **View**, and then select the view you want to use.)

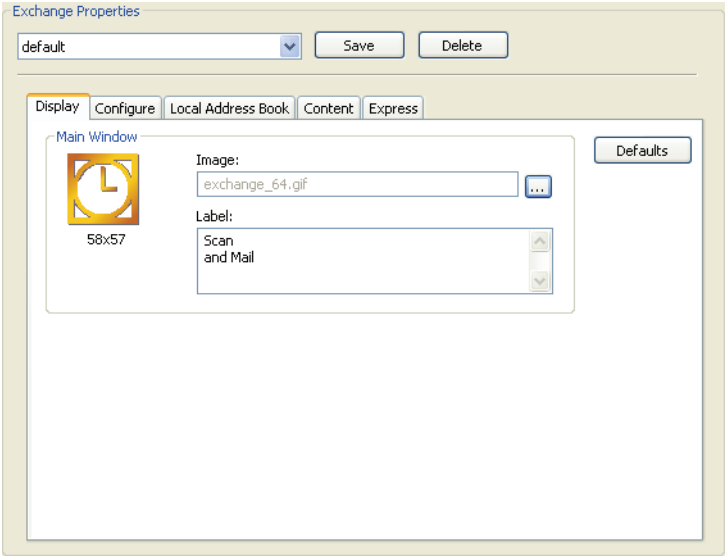


2 Double-click **Exchange**.

The console displays the **Properties** and **Services** icons.

3 Double-click **Properties**.

The **Exchange Properties** pane appears.



To configure the Display properties:

1 Select the **Display** tab.

2 To modify the image associated with the connector profile's button, click the Browse button next to the **Image** field, locate the image that you want to use, and then click **Open**.

3 To modify the button label, click in the **Label** field and enter the new text.

4 Click **Save.**

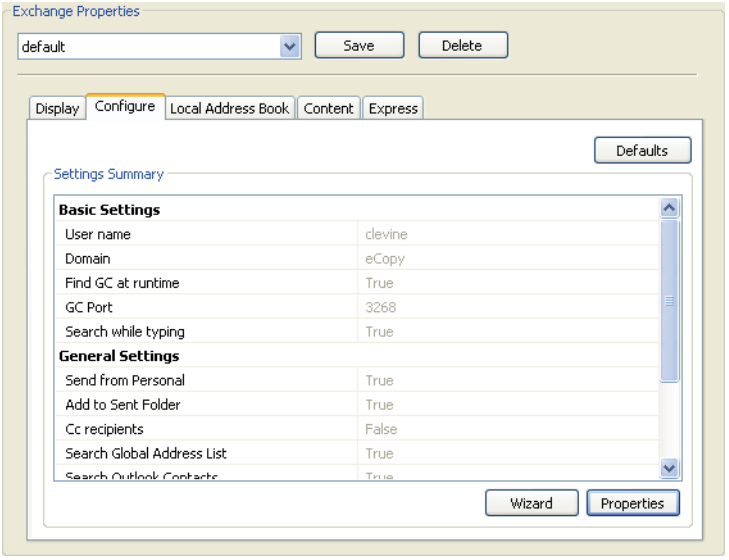
The **Save Profile** window opens.

5 Enter **exchange_express** as the name of the profile, or leave "default" as the name, and then click **Save**.

To configure the ShareScan user properties:

1 Select the **Configure** tab. This tab looks a little different for each connector, but most of the connectors, especially the e-mail and fax connnectors, contain similar types of settings.

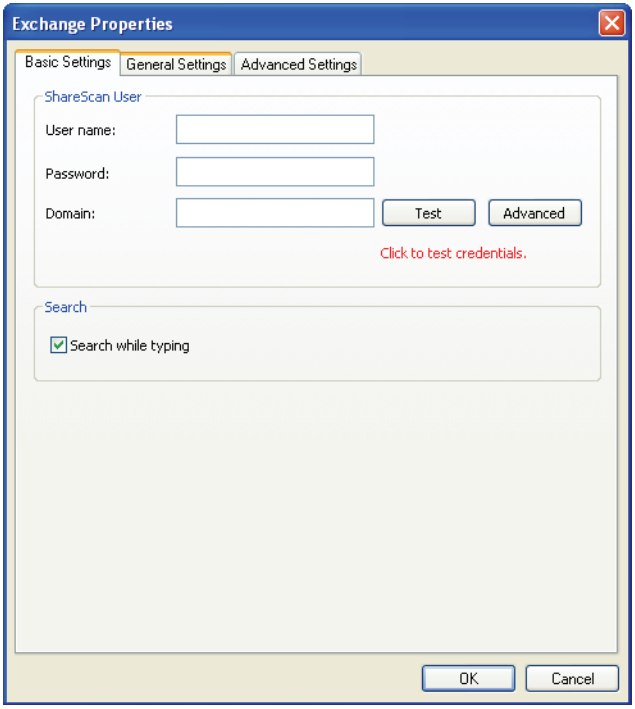
> **Note:** Some connectors, such as the Exchange Connector, include a Wizard that walks you through the standard environment settings. For information about using the Wizard to initially configure an Exchange connector profile, see page 177.



2 Click **Properties**.

The **Exchange Properties** window opens.

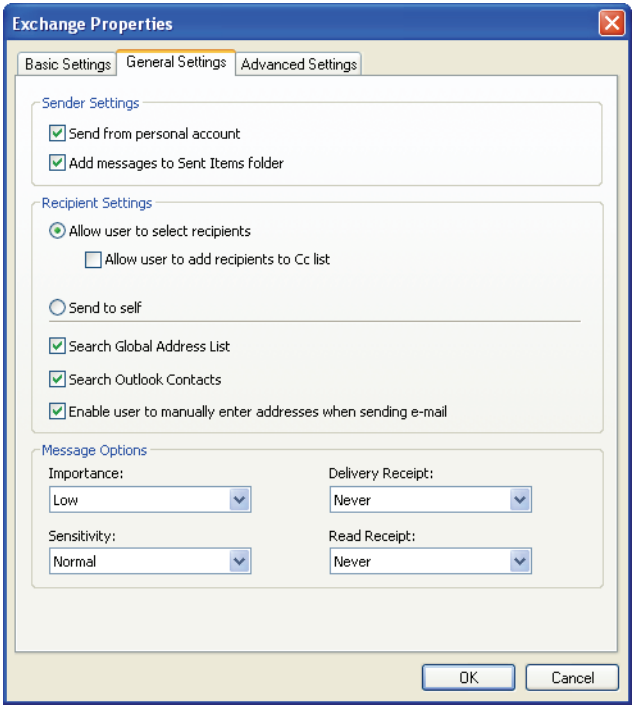
3 Select the **Basic Settings** tab.



4 Enter the ShareScan User information and then click **Test**.

When the console displays the "Test successful" message, proceed to the next step.

5 Select the **General Settings** tab.



- To configure the profile to enable users to send scanned documents as e-mail attachments from their personal Microsoft Exchange account, select the **Send from personal account** option.
- If you do not want to configure the profile to enable users to send scanned documents as e-mail attachments from their personal Microsoft Exchange account, clear the **Send from personal account** option. The connector will send the scanned documents from the ShareScan User Account.
- To configure the profile to enable users to send scanned documents only to the logged on user, select the **Send to self** option. The Send screen will not appear on the Client screen at the device.

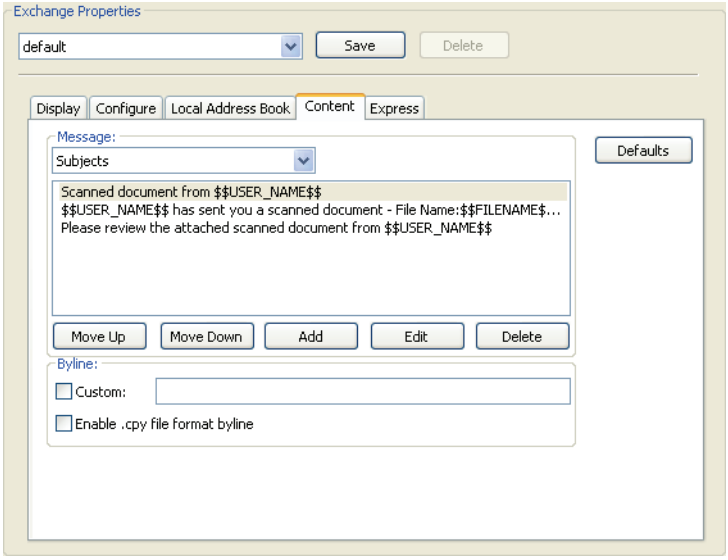
6 When you have specified the basic and advanced settings, click **OK**.

The **Settings Summary** displays the current basic and advanced settings.

7 Click **Save** to save changes to the profile.

To configure the Content properties:

1 Select the **Content** tab.



2 To specify the default subject that will be available to the user at the device, select it in the **Subjects** list. The user can accept the default subject or enter a new subject.

3 To specify the default note, select **Notes** in the **Message** area and then select a note.

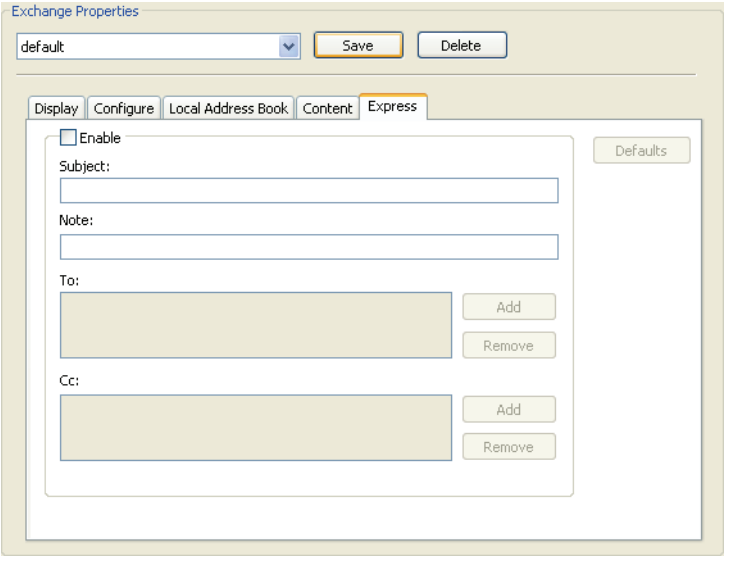
4 The **Content** tab enables you to specify the default subject or note information that will be available to a user at an eCopy-enabled device.

5 Click **Save** to save changes to the profile.

To configure Express properties:

1 Select the **Express** tab.

This feature enables you to create a profile that minimizes user interaction at the device; the Send screen will not appear on the Client screen at the device.



2 Select the **Enable** check box.

3 Enter information in the **Subject** and **Note** fields.

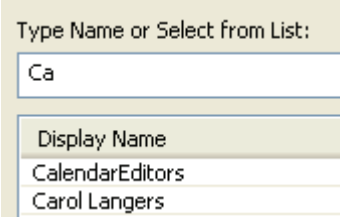
The user at the device will not have to specify a subject line or a note.

Note: The connector will not use the default subject line or notes specified on the Content tab.

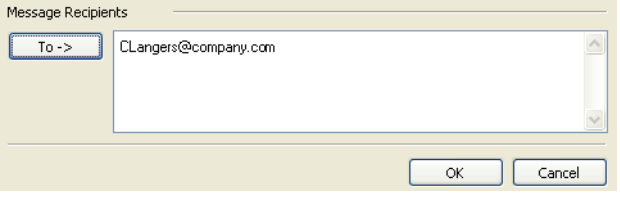
4 To specify one or more recipients, click the **Add** button associated with the **To:** field.

The **Add Recipients** window opens.

5 With the **Search while typing** option selected, enter the first few characters of a recipient's name. As you type, the system displays names that match the characters you entered.



6 Select each recipient that you want to include on the **To:** list and then click **To ->** in the **Message Recipients** area.



7 Click **OK**.

The console displays the recipients in the **To:** list. The user at the device will not have to select any recipients.

8 Click **Save** to save changes to the profile.

Activating connector profiles

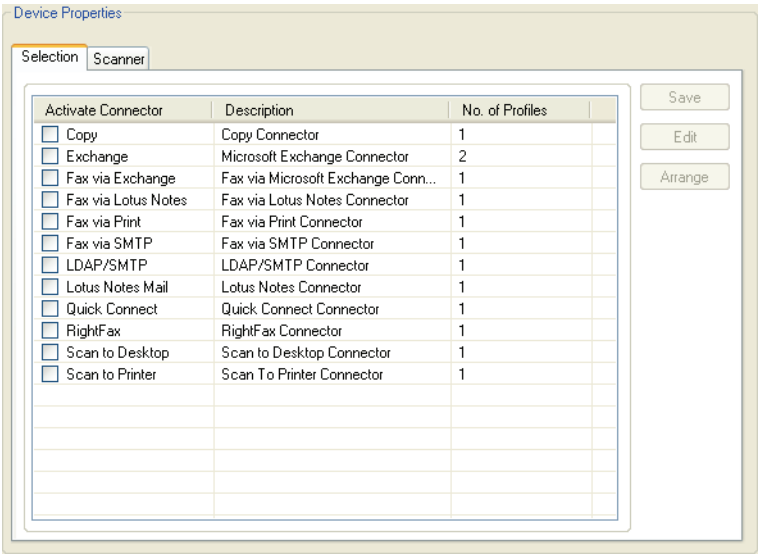
This section describes the process of activating a connector profile on a device.

To access the Device Properties pane for a device:

1. In the console tree, select **Devices**.
2. Select a device.
3. Select **Properties**.

   The **Device Properties** pane displays the list of available connectors and the number of profiles that have been created for each connector.

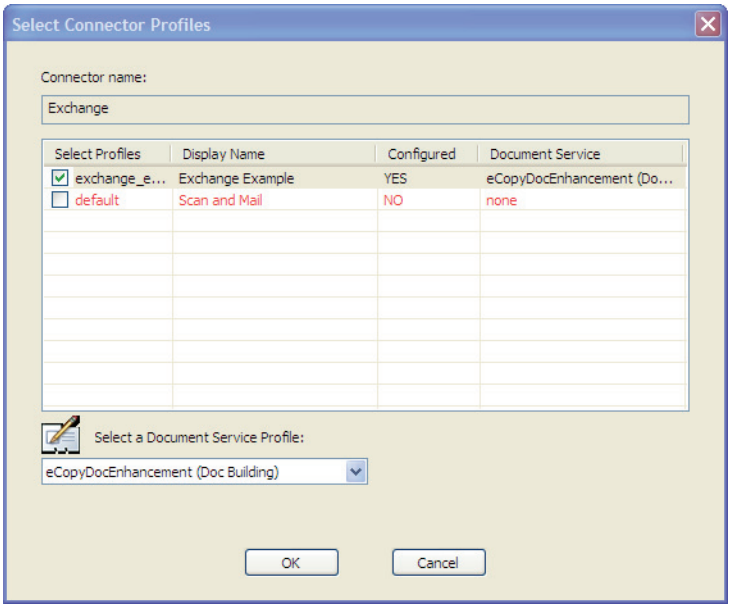
> **Note:** The Arrange button enables you to position connector buttons in a particular order on the device's touch screen.



To activate a connector profile on the selected device:

1 Select the **Activate Connector** check box for Exchange.

The **Select Connector Profiles** window opens. If you have not saved a profile's settings, the profile name appears in red.



2 Select a configured profile, such as "exchange_express".

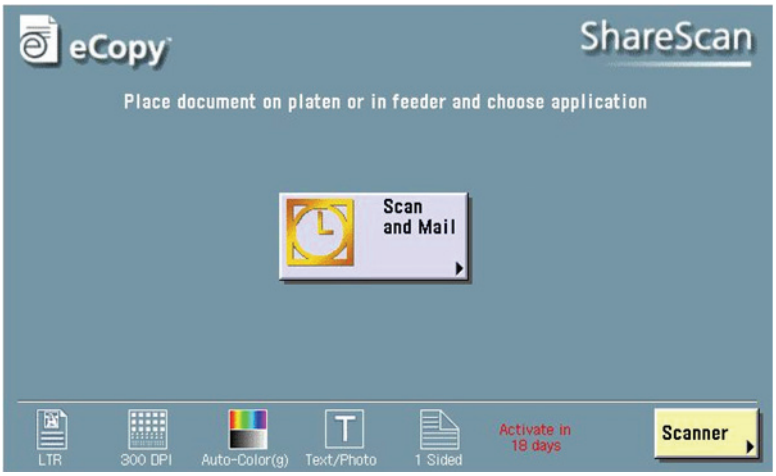
3 If your company uses Document Services, use the **Select a Document Service Profile** list to select the Document Services profile that you want to associate with the connector profile.

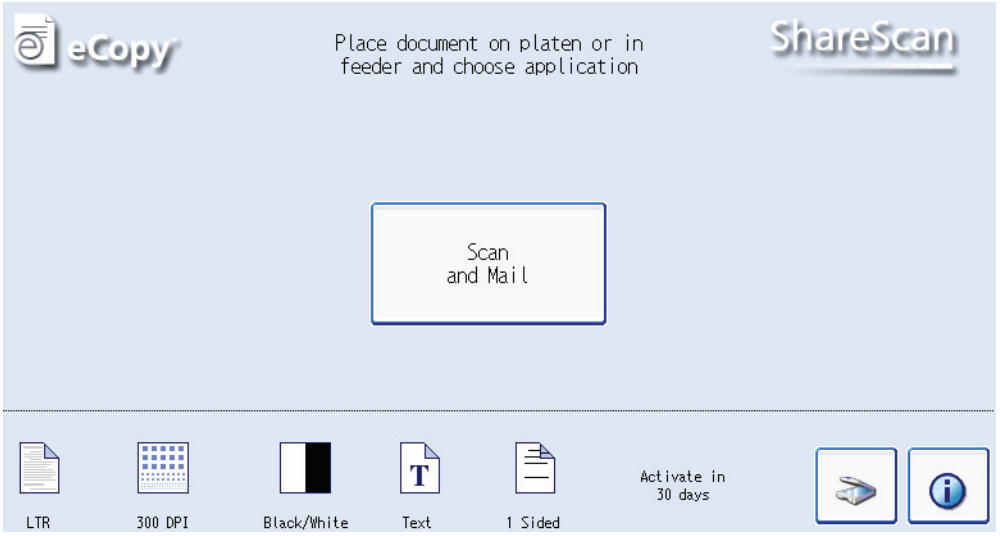
4 Click **OK**.

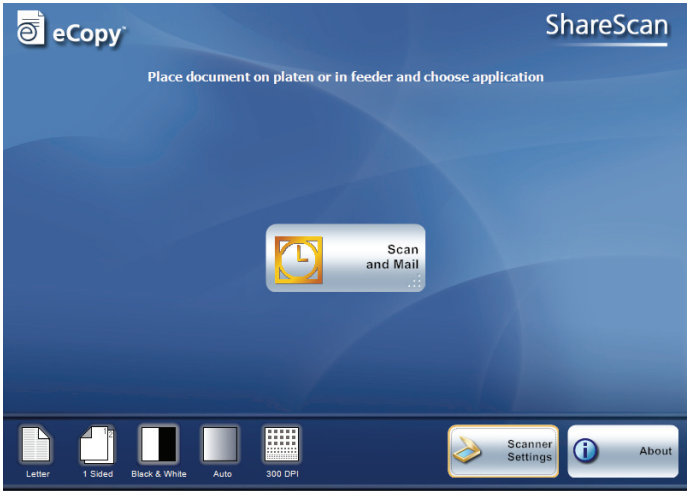
The **No. of Profiles** column indicates that you have activated one connector profile and the Document Service profile name appears in the **Document Services** column.

5 In the **Device Properties** pane, click **Save** to save changes to the profile.

At the device, the touch screen will display a button for each active connector profile, up to a maximum of nine buttons. (If you are using the Client with Send to eCopy, the settings in the lower left corner of the following screen will not appear.)






eCopy
ShareScan
Place document on platen or in feeder and choose application
Scan and Mail
Letter
1 Sided
Black & White
Auto
300 DPI
Scanner Settings
About

Configuring and starting the ScanStation Client

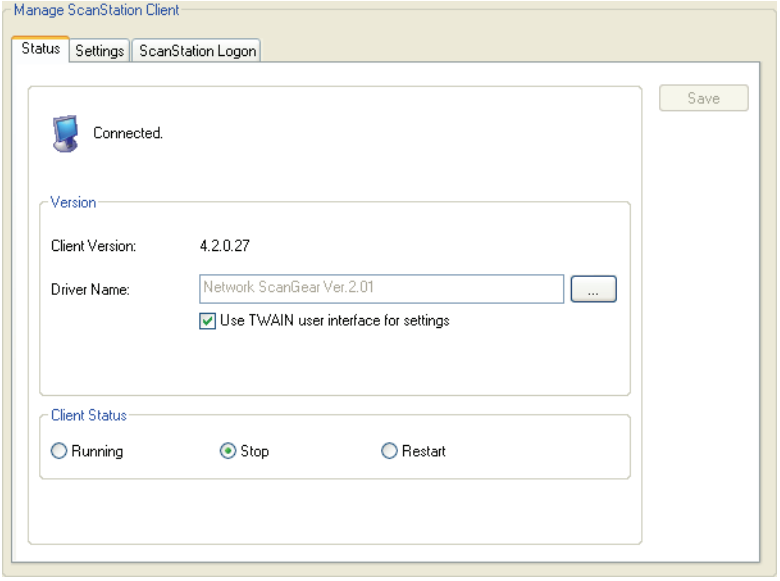
This section provides you with basic information about configuring and starting the ScanStation Client. For information about managing the Client, see page 273. For information about using eCopy Connectors, see page 281.

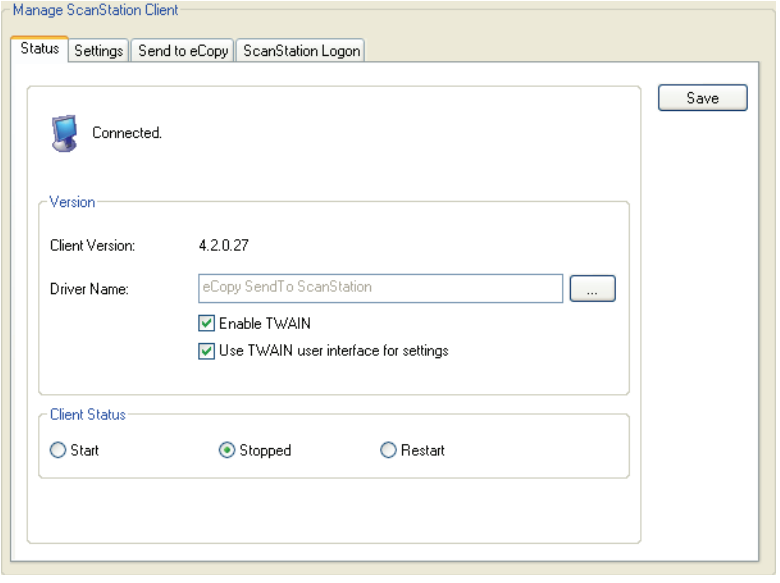
Note: If you are using ScanStation with Send to eCopy, you must set up and configure the MFP device before starting the Client (see page 95).

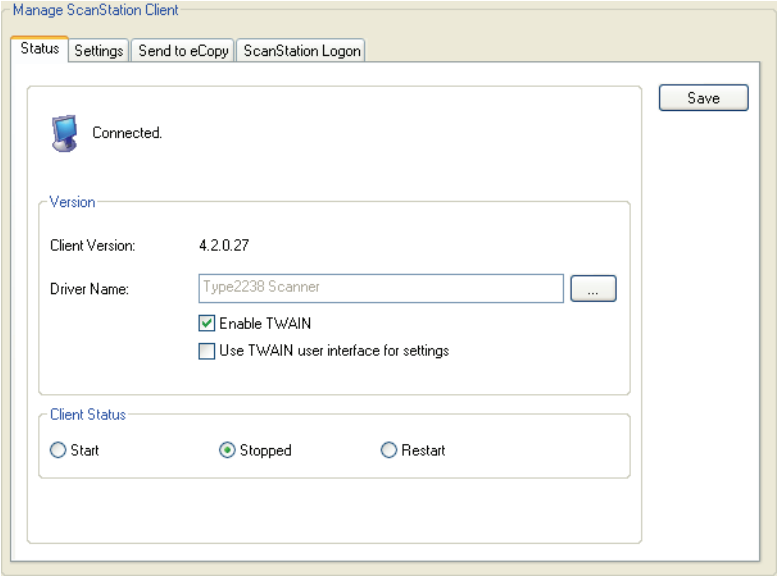
To configure the ScanStation Client:

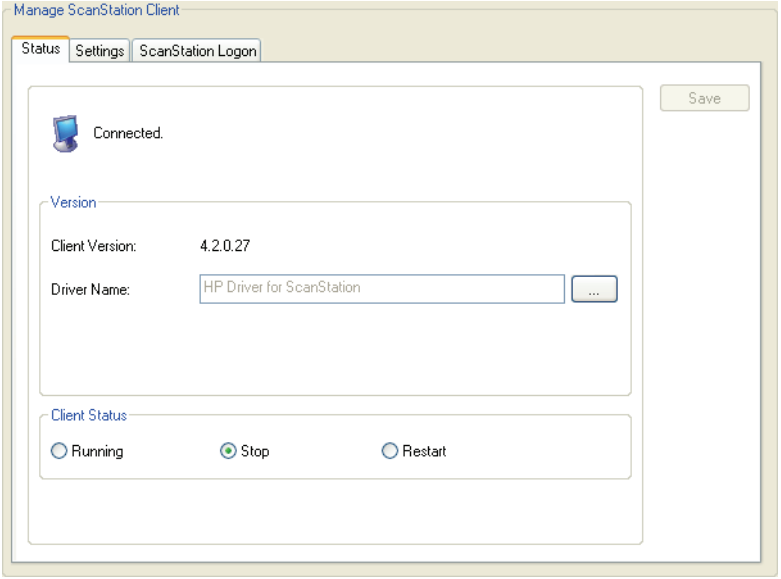
1 In the console tree, select **Devices** > <*device_name*> > **Manage**.

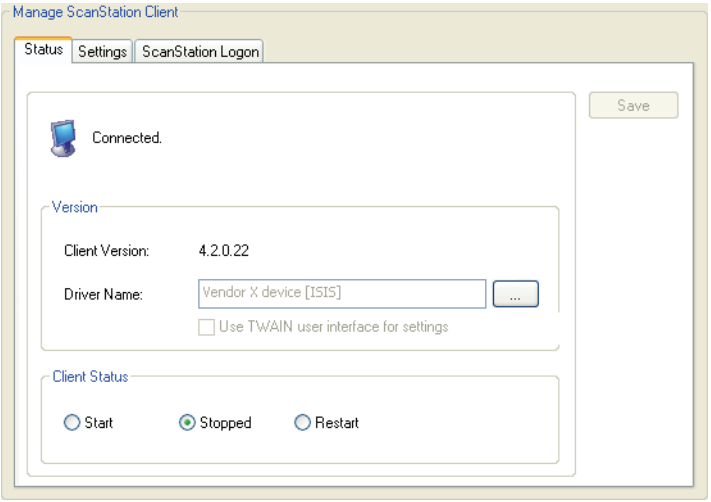
The **Manage ScanStation Client** pane appears. The information in the **Driver Name** field is based on the product key.

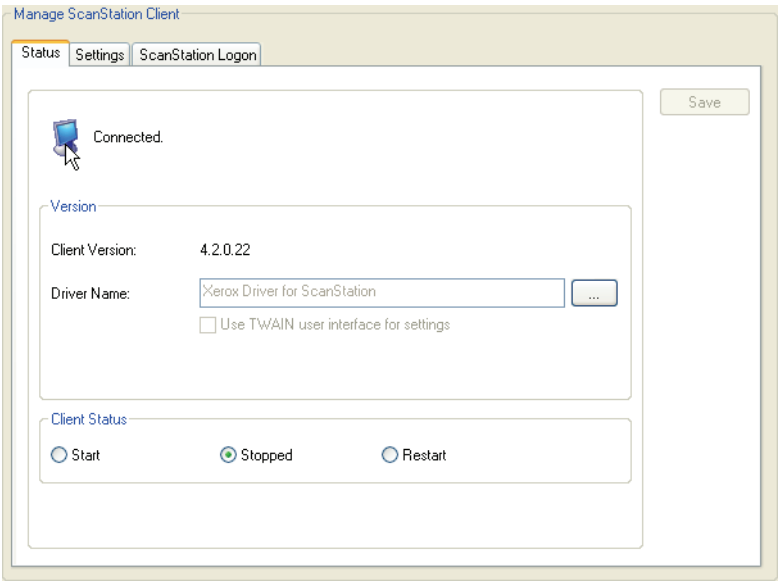





Manage ScanStation Client
Status
Settings
Send to eCopy
ScanStation Logon
Save
Connected.
Version
Client Version:
4.2.0.27
Driver Name:
Type2238 Scanner
...
Enable TWAIN
Use TWAIN user interface for settings
Client Status
Start
Stopped
Restart


Manage ScanStation Client
Status
Settings
ScanStation Logon
Save
Connected.
Version
Client Version:
4.2.0.27
Driver Name:
HP Driver for ScanStation
...
Client Status
Running
Stop
Restart

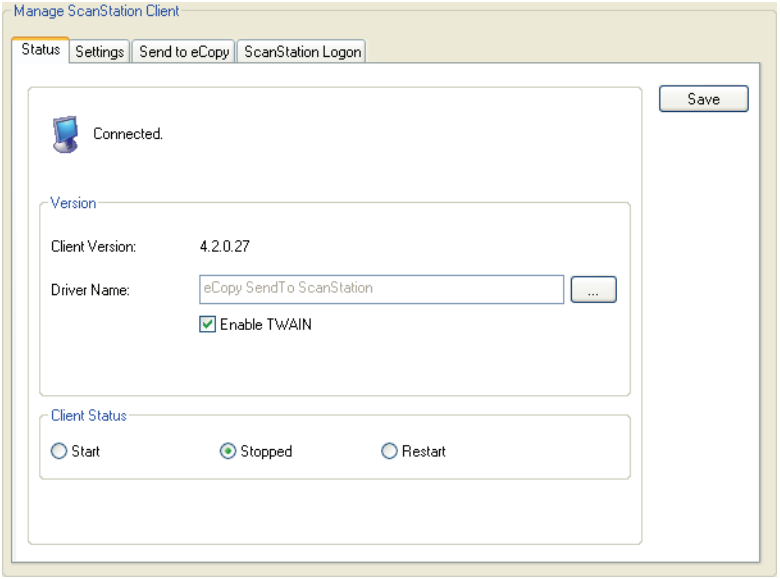




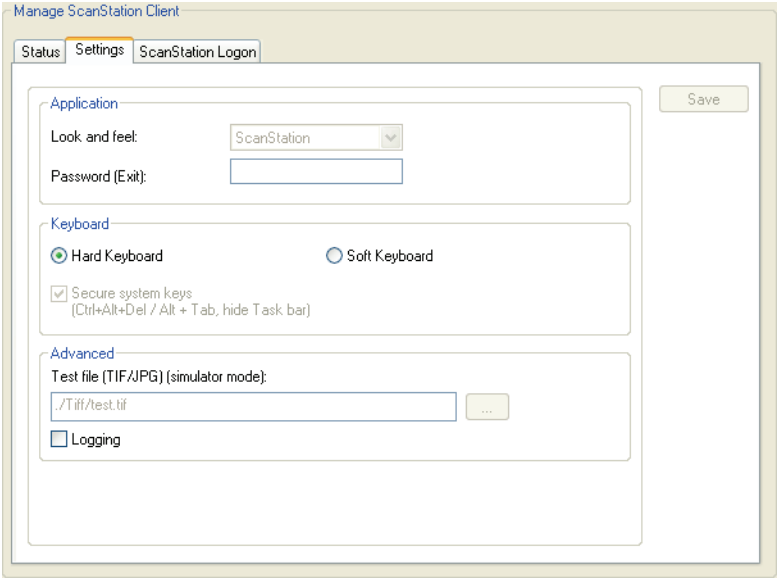
If you are using a TWAIN driver, the **Use TWAIN user interface for settings** check box may enable you to configure the Client to display the interface provided by the TWAIN driver.

If you set up an MFP device to use with Send to eCopy, this pane will include a **Send to eCopy** tab. (To enable Send to eCopy on a Ricoh MFP, clear the **Enable TWAIN** check box on the **Status** tab and then click **Save**. The driver name changes to "eCopy SendTo ScanStation".)

If you are using a TWAIN driver on this ScanStation, select **Enable TWAIN**.



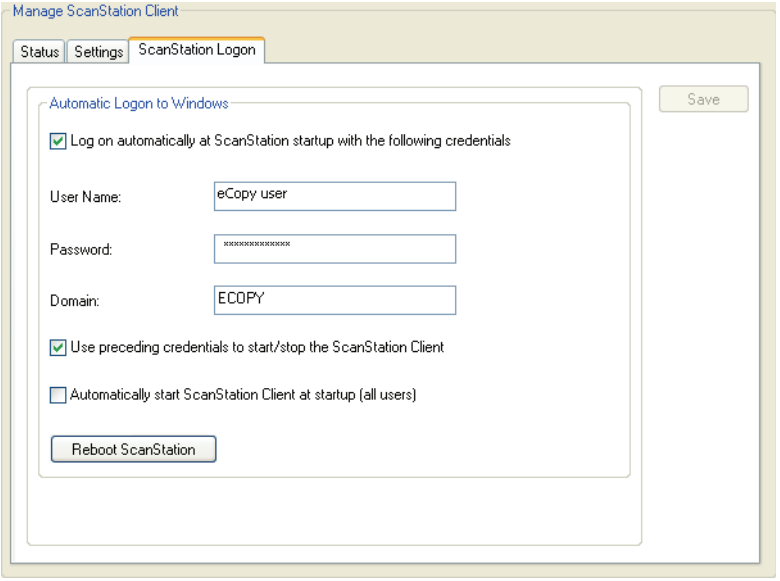
2 Select the **Settings** tab, enter a password in the **Password (Exit)** field, and then click **Save**. Specifying an exit password prevents unauthorized users from quitting the Client.



Important! By default, the system keys are secured and the taskbar is hidden. This ensures that users cannot shut down the ScanStation, invoke the Start menu, or access other applications. You cannot disable this option. However, even though the system keys are secured, authorized users can quit the Client (see page 276).
The system key combination, Ctrl+Alt+Del, invokes the Windows Security window. If the client is running under an account with local administrator privileges, the Task Manager button is disabled. If the client is running under an account with user privileges, the Task Manager button is not disabled. However, if the user clicks it, the Task Manager opens, and then closes immediately.

3 Select the **ScanStation Logon** tab.

You must specify logon credentials on this tab. The Client will not start if the credentials fields are blank.



4 To specify your logon credentials:

- Select the **Use preceding credentials to start/stop the ScanStation Client** check box.
- Enter your user name, password, and domain.
- Click **Save**.

To start the Client:

Note: If you are using ShareScan on a Windows Vista operating system, you must start the Client by selecting Start > Programs > eCopy Applications > ScanStation Client.

1 Select the **Status** tab.

2 Under **Client Status**, click **Start**.

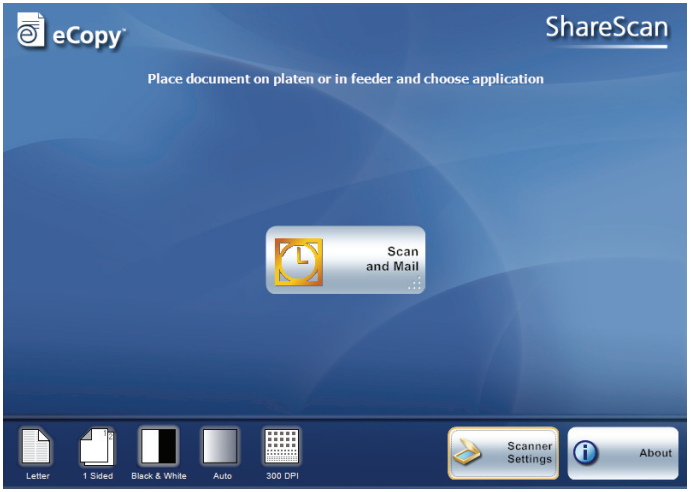
The Client appears on the device's touch screen.

Note: Depending on the device that is connected to the ScanStation, you may be prompted to select the device the first time that you start the Client or the first time that you select a connector.

A button appears for each connector that you have configured for the device.

The scanner settings specified on the device's **Scanner Settings** tab in the Administration console appear in the lower left corner of the screen, unless you enabled use of the TWAIN driver's interface.

If you are using the Client with Send to eCopy, the settings in the lower left corner of the screen will not appear.



3 Press the connector button.

If prompted, select your TWAIN-enabled device.

If the TWAIN driver's user interface window opens, specify the settings that you want to use and then press the driver's "Scan" button.

4 To quit the Client, use either of the following methods:

- If you are using the hard keyboard, press ESC or ALT+F4.

  When the **Exit** window opens, enter the exit password and then select **Yes**.

- If you are using the on-screen (soft) keyboard, press **About**.

  On the **Version** tab, press (Exit), enter the exit password and then press **Yes.**

Quick Start: Setting up MFPs to use with Send to eCopy

eCopy ScanStation™ enables users of supported multifunction peripheral (MFP) devices to scan documents and send them to a shared storage folder on a ScanStation. The ScanStation must be licensed to use eCopy Send to eCopy.

Note: In translated versions of this guide, some translations appear in parentheses. This is because they refer to functions in software products not manufactured by eCopy. The guide attempts to provide the best translation of those functions. If you are unsure of the meaning of any of these translations, please consult the manufacturer's documentation.

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- Creating a network shared folder 97
- Creating an FTP folder 98
- Supported scan settings 99
- Configuring a Konica Minolta MFP 100
- Configuring a Ricoh scanning device 103
- Configuring a Sharp MFP 104
- Configuring a Toshiba MFP with an e-Bridge Controller 108
- Configuring a Toshiba MFP with a GL Controller 111
- Configuring Send to eCopy 115
- Using scanned documents at the ScanStation 118

Setup tasks

Before setting up an MFP that you plan to use with Send to eCopy, make sure that you install eCopy™ ShareScan and then license the product using a Send to eCopy key, as described earlier in this guide.

You must then perform the following tasks:

- Create a network shared folder on the ScanStation to temporarily store the scanned image files.
- For some MFPs, create an FTP folder to temporarily store the scanned image files.
- Configure the MFP.
- Create a profile to use with Send to eCopy.
- Configure the ScanStation Client to use Send to eCopy.
- Create connector profiles and activate them on the ScanStation that you are using with Send to eCopy.

Creating a network shared folder

eCopy recommends that you create a network shared folder on the ScanStation before you configure the MFP.

Since the MFP requires write access to the network shared folder, make sure that you assign appropriate permissions to the folder.

eCopy recommends that you name the folder "Toshiba_drop".

To make sure that the folder can be accessed, go to a different computer on the network and try to create a folder in the shared folder. Then try to copy a text file into it. If the system displays any error messages, check the permissions on the shared folder.

Creating an FTP folder

If your company does not have an FTP site, you must create one. See your Microsoft Internet Information Services (IIS) documentation for information about creating the FTP site; you may want to specify **C:\eCopy** as the home directory for the site.

eCopy recommends that you follow these guidelines when creating the FTP site:

- Create the FTP site on the ScanStation.
- Clear the Allow Anonymous Connections check box on the Security Accounts tab.
- Enter the name of a local user who will have access to the FTP site. (You may want to create a dedicated local user account named "FTPeCopy".)

After creating the FTP site, perform the following tasks:

- Open a Web browser and make sure that the FTP site is active.
- Create a folder on the FTP site. Use a descriptive name, such as "eCopyScans".

  For security reasons, you may want to limit access to the FTP folder to a single user.
- Make sure that you can copy a file to the FTP folder.
- Make sure that you create the local user account specified on the Security Accounts tab.

Supported scan settings

Send to eCopy can retrieve scanned image documents from the designated SMB folder or FTP folder only when the output format specified at the MFP is TIFF (single-page or multi-page) or JPEG. If the output format is JPEG, the software converts the scanned documents to eCopy (CPY) format.

eCopy strongly recommends that users do not select PDF as the output format for documents that they want to use with Send to eCopy.

Since Send to eCopy runs on many different MFPs, the available scanner settings, including output format and image resolution, depend on the MFP.

Configuring a Konica Minolta MFP

To configure a Konica Minolta MFP to use with Send to eCopy, you perform the following tasks:

- Register a destination.
- Specify address book settings.
- Register a "program" for use on the MFP. The "program" refers to a destination and a set of scan settings that are registered together.

To configure the MFP:

1. Make sure that the MFP is running.
2. Connect to the Konica Minolta MFP by entering the IP address in the address bar of Internet Explorer, as in the following example:

   `http://10.10.12.999`

   The **Konica Minolta Web Connection** page for a public user opens, displaying information about the MFP.
3. To register a destination:
   - Click **Scan**.

     The **Address Book List** page opens.
   - Click **New Registration**.

     The **New Registration** page opens.
4. To specify address book settings:
   - Select **SMB** and then click **Next**.

     The **Address Book (SMB)** page opens.
   - Specify the address book settings (see Table 2) and then click **Apply**.
   - When the "Address Book registration is complete" message appears, click **OK**.

     The new destination appears in the Address Book list.

5 To register the program:

- In the navigation pane, click **Program**.

  The **Program List** page opens.

- Click **New Registration**.

  The **New Registration** page opens.

- Select **SMB** and then click **Next**.

  The **Program (SMB)** page opens. For Send to eCopy, you must at least specify the settings required for eCopy (see Table 3). However, you can specify any other scan settings that you want the program to use.

- Click **Apply**.

- When the "Program registration is complete" message appears, click **OK**.

  The program appears in the Program List.

TABLE 2. Konica Minolta MFP: Address Book SMB settings

Field	Description
Name	The destination name.
Index	The index tab on which you want the destination to appear.
Host Address	The IP address of the ScanStation where you created the SMB folder.
File Path	The path to the SMB folder.
User ID	The ID used to log on to the ScanStation.
Password	The password used to log on to the ScanStation.

TABLE 3. Konica Minolta MFP: Settings required for eCopy

Field	Description
No.	The registration number. This number identifies the program on the Program tab at the MFP.
Name	The registration name, such as "eCopy Scans".
Destination Information	The destination that you registered in step 3. (To specify the destinaton, select the Select from Address Book option, click the icon next to the field, select the destination.)

Scanning documents

You scan documents to the shared network folder that you created for use with Send to eCopy.

To scan documents:

1. Load your originals into the MFP.
2. Press the **Scan** button on the control panel.
3. On the **Program** tab, select the program you registered, such as "eCopy Scans".
4. Press the **Start** button on the control panel to start scanning.

Configuring a Ricoh scanning device

Before scanning documents for use with Send to eCopy, you must set up Ricoh's Scan to Folder or Scan to FTP feature on your Ricoh MFP. Scan to Folder and Scan to FTP enable you to scan documents to shared folders that other users or applications, such as Send to eCopy, can access. Refer to your Ricoh documentation or to the Ricoh Support Knowledge Base for information about setting up Scan to Folder or Scan to FTP.

Scanning documents

Scan documents to the designated network folder that you created for use with Send to eCopy. The scanning process varies according to the MFP.

Fiery-enabled Ricoh MFPs

The following instructions apply to Fiery-enabled Ricoh MFPs.

To scan documents:

1. Load your originals into the MFP.
2. Select **Fiery**.
3. Select **Scan**.
4. Select **Preset** and then select **Destination Preset**.
5. Scroll to the eCopy destination and then select **Load**.
6. Press the Green button to start scanning.

Ricoh controllers on MFPs

The following instructions apply to MFs with Ricoh controllers.

To scan documents:

1. Load your originals into the MFP.
2. Select **Scanner**.
3. Select **Folder**.
4. Scroll to the eCopy destination.
5. Press the Green button to start scanning.

Configuring a Sharp MFP

To configure a Sharp MFP to use with Send to eCopy, you create a profile that uses a shared network folder (see page 104) that uses the Microsoft SMB (Server Message Block) Protocol, or a profile that uses an FTP folder (see page 105).

You can then scan documents to the scan destination (see page 107).

Creating a profile that uses a shared network folder

If you are using a shared network folder (SMB) to store scanned image documents on the ScanStation, you specify the path to the target folder in a profile. You can use an existing profile or you can create a new profile. The user at the MFP selects the scan destination specified in the profile.

You should use the Sharp Network Scanner Tool — not the Web Setup button — to create any profiles that you plan to use with Send to eCopy.

The instructions in this section assume that you have installed Sharpdesk and accepted the default profiles. The procedure describes only the steps that you need to complete to enable use of the MFP with Send to eCopy.

To create a profile that uses a shared network folder:

1. To run the Network Scanner Tool, select **Start** > **Programs** > **Sharpdesk** > **Network Scanner Tool**.

   The **Profiles** tab lists all available profiles. You can use an existing profile with Send to eCopy.

2. On the **Profiles** tab, click **New**.

   The **Properties for Profile** window opens.

3. Specify the profile name, which will appear on the MFP's control panel, and descriptive information, such as, "Scan to shared folder for eCopy".
4. Select the **Move File to Folder** check box and then click **Details**.

   The **Send To Folder** window opens.

5 If the default folder is the network shared folder that you created on the ScanStation (see page 97), click **OK**. Otherwise, click **Browse**, select the target folder, and then click **OK**.

The **Send To Folder** window displays the name of the target folder.

6 Click **OK** to return to the main **Network Scanner Tool** window.

The **Profiles** tab now lists the new profile.

7 Click **Apply** to save the new profile on the MFP or MFPs specified on the **Scanners** tab and then click **Close**.

8 Click **OK** to quit the program.

Creating a profile that uses an FTP folder

When you configure the MFP, you specify information about the target FTP folder (see page 98) and the authorized FTP user in a profile.

Make sure that you have the MFP's IP address before you begin.

To create a profile that uses an FTP folder:

1 Make sure that the MFP is running.

2 Open a Web browser and then connect to the Sharp MFP by entering the address in the address bar of Internet Explorer, as in the following example:

`http://device_IP_address`

3 Press ENTER.

The **System Information** page opens.

4 Under **Image Send Management**, click **Destination** and then log on to the MFP.

5 Under **New Destination**, click **FTP**.

6 Under **FTP Destination Control**, make sure that you specify the information that Send to eCopy requires (see Table 4) in addition to any information that the MFP requires.

> **Note:** To use this profile with Send to eCopy, you must enter user name, password, and directory information, even though the screen indicates that the fields are optional.

7 Click **Submit**.

When the system displays the "Your request was successfully processed" message, the profile is available at the MFP

.

TABLE 4. Sharp MFP: FTP Destination Control settings

Field	Description
Hostname or IP Address	The address of the FTP site, such as, 10.10.12.110.
User Name	The name of the FTP user created to access the FTP site, such a, "FTPeCopy".
Password	The password of the FTP user.
Directory	The path to the target FTP folder created for temporary storage of the scanned image documents, such as "\scans" or "\scans\HR".

Scanning documents

You scan documents to the scan destination specified in the profile that you created for use with Send to eCopy.

To scan documents:

1. Load your originals into the MFP.
2. Press the **Image Send** button on the control panel.
3. Press **Address Directory** on the touch screen.
4. Select the profile that you created for use with Send to eCopy.
5. Press the **Start** button on the control panel to start scanning.

Configuring a Toshiba MFP with an e-Bridge Controller

To configure a Toshiba MFP to use with Send to eCopy, you perform the following tasks:

- Set up the SCAN TO FILE locations (see page 108).
- Create a scan template group (see page 109).
- Create and configure scan templates (see page 109).
- Secure the MFP (see page 110).

You can then scan documents using the scan template (see page 110).

Setting up the SCAN TO FILE locations

Use the following procedure to set up SCAN TO FILE locations.

To set up the SCAN TO FILE locations:

1. Connect to the Toshiba MFP by entering the IP address or its SMB name in the address bar of Internet Explorer, as in the following examples:

   `http://10.1.33.31/`

   `http://Solutions-450/`
2. Select the **Administration** tab and then log in as "Admin" (the default password is "123456").
3. Select **Save as file**.
4. Under **Local Storage Path**, select **Send scanned documents directly to the storage path**.
5. Under **Destination**, select **Use Network folder Destination**.
6. Under both **Remote 1** and **Remote 2**, specify the following settings:

Option	Description/Setting
Allow the following network folder to be used as a destination	Select this option.
Protocol	SMB
Network Path	**\\eCopy_IP\Toshiba_drop** or **\\Share-Name\Toshiba_drop**
Login User Name and Password	A fully-qualified user name (*domain\user_name*) and password for the specified machine.

7 Save the information.

8 Click **Log Out**.

Creating a scan template group

Use the following procedure to create a scan template group on the MFP.

To create a scan template group:

1 Select the **Registration** tab.

2 Select a template group that is "Undefined", such as "001".

3 Enter a name for the group, such as "eCopy ScanStation".

4 Save the information.

Creating and configuring scan templates

This section specifies only the required settings. You can specify other settings to make each template unique. Examples of templates that you might want to create are:

- 1-sided (Auto Color and Auto paper size)
- 2-sided (Auto Color and Auto paper size)

To create and configure scan templates:

1 Select the "eCopy ScanStation" template group.

2 Select an "undefined" template.

3 Select the **Scan and Save as file** options and then click **Select Agent**.

4 Select **Panel Setting**, specify the following settings, and then click **Save**.

Option	Description/Setting
Caption1 and Caption2	Information that describes the specific settings.
Automatic Start	Enable. (Available only with e-Bridge version 3.0.0 and later.)

5 Click **Save as file Setting**, specify the following settings, and then click **Save**.

Option	Description/Setting
File Format	TIFF-S (single-page TIFF).
Use local folder	Clear this option.
Remote 1	Select this option (required).

6 Select **Scan Setting**, specify the following settings, and then click **Save**.

Option	Description/Setting
Single/2-Sided Scan	Specify as needed for the template.
Resolution	300 dpi.

7 At the top of the screen, click **Save** to save all the information.

Important! Selecting "Auto Color" or "Full Color" as the Color Mode setting will affect the configuration saved under the Save as file Setting area. These color selections automatically reset the file format to PDF. Review the setting before saving the template.

Securing the MFP

You may want to disable the MFP's ability to send files to locations other than to the ScanStation. To do this, a service technician must perform the procedure described in this section.

To secure the MFP:

1 To secure (disable) **eFiling**, set "08-1433" to **1**.

2 To secure (disable) **Scan to Disk**, set "08-1434" to **1**.

3 To secure (disable) **e-mailing**, disable both the SMTP Client and the SMTP Server under **Administration** > **Network**.

Scanning documents

Use the following procedure to scan documents using the scan template.

To scan documents using the scan template:

1 Load your originals into the MFP.

2 Press the **Template** button, which is a round button located on the control panel.

3 Press the name of the template group, such as "eCopy ScanStation".

4 Press the name of the template you want to use, such as "1-Sided".

If the Automatic Start option is enabled, the MFP begins scanning the pages and sends the scanned image documents to the shared folder.

If the Automatic Start option is not enabled, you must press the **Scan** button on the touch screen or press the **Start** button on the control panel to start scanning.

Configuring a Toshiba MFP with a GL Controller

To configure a Toshiba MFP to use with Send to eCopy, you perform the following tasks:

- Create a scan template group (see page 111).
- Create and configure scan templates (see page 112).
- Enable file storage in network folders (see page 114).

You can then scan documents using the scan template (see page 114).

Creating a scan template group

Use the following procedure to create a scan template group on the MFP.

To create a scan template group:

1. Connect to the Toshiba MFP by entering the IP address or its SMB name in the address bar of Internet Explorer, as in the following examples:

   `http://10.10.9.88/`

   `http://Solutions-45/`
2. Select **Scan**.
3. Select **Templates**.
4. Select **Template Groups**.
5. Select **New** to create a new template group.
6. Enter a name for the template group, such as “eCopy”.
7. Save the information.

Creating and configuring scan templates

This section specifies only required settings. You can specify other settings to make each template unique. Examples of templates that you might want to create are:

- 1-sided (Auto Color and Auto paper size)
- 2-sided (Auto Color and Auto paper size)

To create and configure scan templates:

1. Select the "eCopy" template group.
2. Click **New**.
3. Under **Template Name**, specify the following settings:

Option	Description/Setting
Caption1 and Caption2	Information that describes the specific settings.
Template No.	The next available value.

4. Under **Template Icon**, select the icon that you want to display on the selection button.
5. Under **Scan Setting**, set the resolution to 300 dpi.

6 Under **Agent Settings**, specify the following settings:

Option	Description/Setting
Send To	File.
Location	Network. (If you cannot select it, see "Enabling file storage in network folders" on page 114.)
Path	**\\eCopy_IP\Toshiba_drop** or **\\Share-Name\Toshiba_drop**
User Name and Password	A fully-qualified user name (*domain\user_name*) and password for the specified machine.
File Format	Single Page TIFF (G4).
Immediately print scanned documents	Clear this option.

7 Click **OK**.

Enabling file storage in network folders

Use the following procedure to enable file storage in network folders on GL controllers.

To enable file storage in network folders on GL controllers:

1. Click the **Administration** tab and then select **Setup**.
2. Select **Fax/Scan Agents**.
3. Select **Send to File**.
4. Make sure the following settings are selected:

Option	Description/Setting
Storage Path	Select Send scanned documents directly to the storage path.
Remote 1	Select Allow user to select network folder to be used as a destination.

5. Save the information.

Scanning documents

Use the following procedure to scan documents using the scan template.

To scan documents using the scan template:

1. Load your originals into the MFP.
2. Press the **Printer/Network** button on the control panel.
3. Press the **Scan** button on the touch screen.
4. Select **Private** next the bottom edge of the touch screen.
5. Press the name of the template group, such as “eCopy”.
6. Press the name of the template you want to use.
7. Select **Scan**.

Configuring Send to eCopy

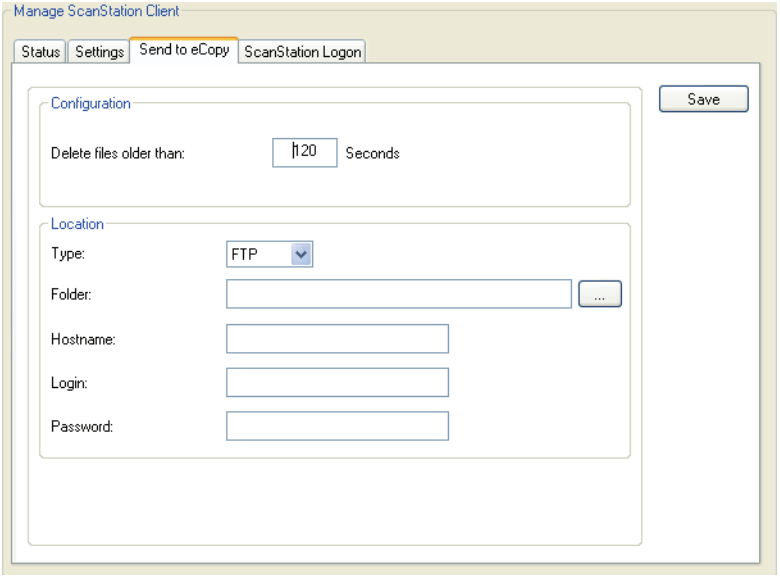
The Send to eCopy tab is available in the eCopy ShareScan Administration console only after you license the ScanStation using a Send to eCopy product key. (To enable Send to eCopy on a Ricoh MFP, clear the Enable TWAIN check box on the Status tab and then click Save.)

To configure Send to eCopy:

1 In the console tree, select **Devices** > <*device_name*> > **Manage**.

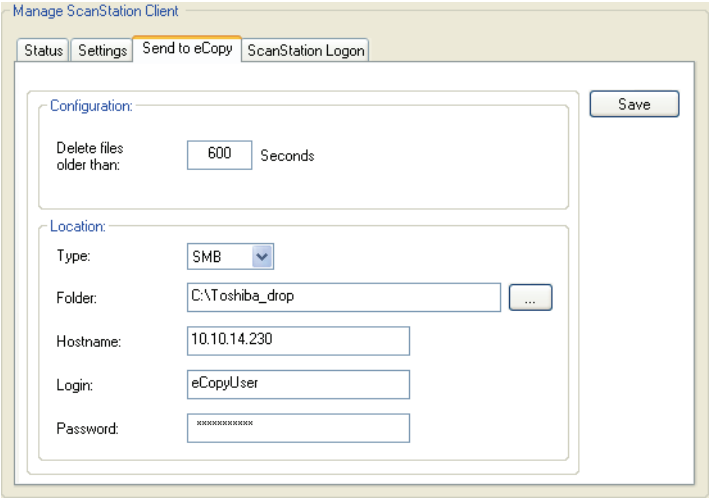
> **Note:** On the Status tab, make sure that the Enable TWAIN check box is not selected.

2 Select the **Send to eCopy** tab.



3 Under **Configuration**, specify a number of seconds. When the ScanStation software finds files in the storage folder that are older than the specified number of seconds, it deletes them.

4 Under **Location**, specify the information about the target storage folder (see Table 5).



5 Click **Save**.

6 Create the eCopy Connector profiles that you want to use and then activate them on the ScanStation (see page 68 in the *Installation and Setup Guide for Ricoh TWAIN devices*).

7 Restart the Services Manager.

TABLE 5. Send to eCopy: Location settings for target storage folder

Field	Description/Setting
Type	Available folder types are "SMB" and "FTP". Select **SMB**. Select **SMB** or **FTP**. (Your selection must match the type of shared network folder you created.) Select **FTP.**
Folder	For an SMB location, enter the path to the target storage folder, such as: ■ C:\KonicaMinolta_drop ■ C:\Ricoh_scans ■ C:\Toshiba_drop ■ \\<*IP_address*>\Sharp_drop (You must specify the path using the MFP's IP address.) For an FTP location, specify the FTP folder, such as "\scans" or "\scans\HR".
Hostname	For an SMB location, enter the IP address of the computer where the Services Manager is installed, such as "10.10.9.111". For an FTP location, enter the IP address of the FTP site, such as "10.10.12.245".
Login	Enter the name of the user who has access to the folder. For an FTP folder, the name must match the FTP user name, such as "FTPeCopy".
Password	Enter the password associated with the user name.

Using scanned documents at the ScanStation

Users, at MFPs configured for use with Send to eCopy, scan documents to the destination storage folder specified on the MFP. The scanned documents are then available for use with eCopy Connectors installed on the ScanStation.

The user at the ScanStation can modify the output and image processing options before retrieving the scanned documents from the storage folder for use with eCopy Connectors.

To use scanned documents at the ScanStation:

1. On the main ScanStation screen, click **Scanner Settings** if you want to modify the output and image processing options.
2. Press a connector button, such as "Scan and Mail".

   The connector retrieves the scanned documents from the storage folder and displays them on the scan preview screen.

Reference: Configuring the system

When you install ShareScan, the Administration console, an MMC (Microsoft Management Console) snap-in, is installed along with the Services Manager and any selected eCopy connectors. You use the Administration console to manage Services Managers, connectors, and eCopy-enabled devices.

An *eCopy-enabled device* can be either of the following types of devices:

- A multifunction peripheral (MFP) or scanner that is externally connected to an eCopy ScanStation™.
- An MFP with eCopy ShareScan Embedded software running in the device.

The Services Manager supports a single device connected to a ScanStation or multiple devices running ShareScan Embedded software.

The Administration console automatically detects the Services Managers on your network and lets you select the one that you want to use.

In this chapter

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- Setting security options for a Services Manager. 121
- Configuring system properties 123
- Licensing devices 129
- Monitoring scanning activity 135
- Reporting scanning activity 136
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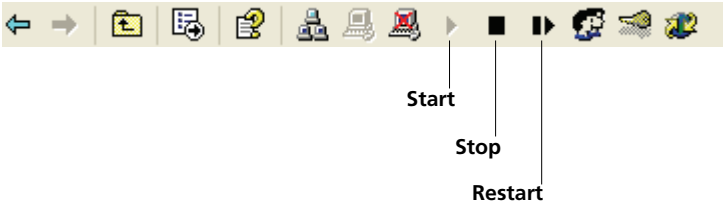
Starting, stopping, and restarting the Services Manager

The Services Manager runs as a Windows service. You start or stop, and restart, the Services Manager from the Administration console.

To start, stop, or restart a Services Manager:

To start, stop, or restart a Services Manager, use either of the following methods:

- In the console tree, right-click the name of the Services Manager. When the shortcut menu displays the available commands, click the command that you want to use.
- In the console tree, select the name of the Services Manager and then click the appropriate button on the console toolbar.



Setting security options for a Services Manager

The Security Options function, which you can configure for each Services Manager, enables you to specify whether other Services Managers have the right to add or acquire devices managed by that Services Manager and to publish connector profiles to that Services Manager.

For example, in a ScanStation environment, you might want to designate a specific ScanStation as the main system where you configure connector profiles and publish them to other ScanStations. On that main ScanStation, you would enable the security option that keeps all other Services Managers from publishing profiles to it. You might then set the security options on the other ScanStations to allow publishing only by the Services Manager on the main ScanStation.

In a ShareScan Embedded environment, you might want to set the security options for a specific Services Manager to allow other Services Managers to add devices managed by it and to publish connector profiles to it.

If you enable security for a Services Manager and add IP addresses to the list of allowed Services Managers, and you later clear the Enable Security option, the addresses stay in the list, but the Services Manager ignores it.

To block access by other Services Managers:

1. In the console tree, select the name of the Services Manager and then click the **Display Security Options** button on the console toolbar.

   The **Security Options** window opens.

2. Select the **Enable** option. By default, this option is disabled.
3. Select the **Prevent addition of devices and connector profile pubishing** option. Other Services Managers will not have the right to add or acquire devices managed by this Services Manager or to publish connector profiles to it.
4. Click **OK**.

To grant access to other Services Managers:

1. In the console tree, select the name of the Services Manager and then click the **Display Security Options** button on the console toolbar.

   The **Security Options** window opens.

2. Select the **Enable** option. By default, this option is disabled.
3. Select the **Allow addition of devices and connector profile publishing** option.
4. In the address field, enter the IP addresses of the Services Managers to which you want to grant access and then click **Add**.

   The addresses appear in the **Manager IP addresses** list.

   Note: Even if addresses appear in the list of allowed Managers, access by those Services Managers will be blocked if you select the Prevent addition of devices and connector publishing option.

5. Repeat step 4 until you have added the addresses of all the Services Managers to which you want to grant access. Those Service Managers will have the right to add or acquire devices managed by this Services Manager or to publish connector profiles to it.
6. Click **OK**.

To remove access rights from a Services Manager:

1. In the console tree, select the name of the Services Manager and then click the **Display Security Options** button on the console toolbar.

   The **Security Options** window opens.

2. In the **Manager IP addresses** list, select the addresses and then click **Remove**.
3. Click **OK**.

   The system prompts you to confirm that you want to remove the selected IP addresses.

4. Click **OK**.

Configuring system properties

You can specify system properties that apply to all devices connected to the selected Services Manager. The System Properties pane contains tabs that enable you to specify general and advanced properties, keyboard settings, Session Logon settings, and tracing information.

The System Properties pane also contains a Bates Numbering tab; Bates Numbering is an add-on eCopy Service. For more information, see the *eCopy Bates Numbering Service Administrator's Guide*.

Configuring general system properties

The General tab displays version, language, and operating system information. It also enables you to specify port information and a scanning mode for eCopy-enabled devices with ShareScan Embedded software.

To configure general system properties:

1. In the console tree, select **System Information** > **Properties** and then select the **General** tab.
2. Configure the general system properties (see Table 6).
3. Click **Save**.

TABLE 6. System properties: General tab

Section	Field Name	Description
Product Information	Port	The TCP/IP port to use for communication between the Services Manager and eCopy-enabled devices. The default is 9100. If you need to change this setting, make sure that you also change the port number that is specified on each device's Manage node.
Scanning Mode	Enable Start Button	Enables the Start button to be used to initiate scanning on a device with ShareScan Embedded software. When this option is enabled, users at the device must press the Start button after selecting a scanning function or when they want to scan additional pages using the Scan More button on the scan preview screen.

Configuring advanced system properties

The Advanced tab enables you to configure properties for encryption, the searchable text engine, secure deletion of temporary files, and color compression.

To configure advanced system properties:

1. In the console tree, select **System Information** > **Properties** and then select the **Advanced** tab.
2. Configure the advanced properties (see Table 7).
3. Click **Save**.

TABLE 7. System properties: Advanced tab

Section	Field Name	Description
Encryption properties	Password Minimum Length[a]	The minimum number of characters that make up the password. When you specify the minimum password length, remember that the longer the password, the more difficult it is to break.
	Password must be alphanumeric	Requires that passwords include a combination of characters and numbers. This helps ensure that passwords are not dictionary words and are not easily guessed.
Searchable Text Engine Properties	Select a language for Searchable Text creation	The language that you want the Searchable Text engine (the OCR engine) to use. The default is the language specified on the Keyboard Settings tab. The list of languages depends on the YTR files that are installed in the ShareScanOPManager\OCR\Lib folder. The ShareScan installation program installs the language files that are supported by the current version.
Secure Delete	Enable secure delete of temporary files	Enables complete deletion of temporary image files from the PC running the Services Manager. When this check box is selected, ShareScan writes over the files in the ShareScanOPTemp folder multiple times with random characters. There may be a small performance penalty associated with selecting this option.
Color Compression	High	The best text quality and the smallest file size.
	Medium	The best image quality.

[a] Document encryption is only as strong as the password used to generate the encryption key. The rules specified on this tab are enforced when you enable encryption on the Services > Document Settings tab for a connector profile. If a user at a device enters a password that does not meet the requirements, an error message appears and the user must enter a different password.

Configuring keyboard settings

The Keyboard Settings tab enables you to select a language for the hard keyboard as well as for the on-screen keyboard. It also enables you to configure additional settings for the on-screen keyboard.

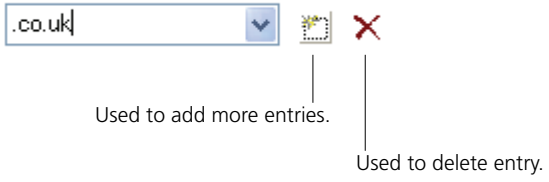
Notes: ScanStation devices support a hard keyboard and the on-screen keyboard; for information about specifying the keyboard to be used on a ScanStation, see the "Configuring the keyboard" section" in the documentation provided with your ScanStation.
Some devices running ShareScan Embedded software support a hard keyboard and the on-screen keyboard; in these cases, ShareScan detects the hard keyboard automatically. You do not have to specify which keyboard to use on the device.
Some devices running ShareScan Embedded software support only the on-screen keyboard.

To configure keyboard settings:

1. In the console tree, select **System Information** > **Properties** and then select the **Keyboard settings** tab.
2. Configure the keyboard settings (see Table 8).
3. Click **Save**.

TABLE 8. System information: Keyboard Settings tab

Section	Field Name	Description
Keyboard Settings	Select a language for the keyboard	The keyboard language.
	Default .com entry	On-screen keyboard only. The default extension for the .com key, such as .com.
	Add more entries	On-screen keyboard only. Used to specify additional extensions to include in the list that appears when the user at the device presses the arrow next to the .com key. Additional entries can contain more than eight characters.



Configuring Session Logon

When you enable Session Logon, users at a device only need to log on a single time to ShareScan; their logon information is effective for the entire session. The users do not have to enter their logon information each time they select a connector during the current session; the Services Manager passes the session logon information to the connector.

Note: If a user needs to access different servers, and the logon credentials are not the same on those servers, the system will prompt the user to enter logon information, even when Session Logon is enabled.

If you enable Session Logon for the Quick Connect, LDAP/SMTP, or Fax via SMTP connectors, eCopy recommends that you refer to the connector-specific configuration section for information about selecting the authentication type.

To configure Session Logon:

1. In the console tree, select **System Information** > **Properties** and then select the **Session Logon** tab.
2. Select **Enable Session Logon**.
3. Configure the Session Logon settings (see Table 9).
4. Click **Save**.
5. Restart the Services Manager to apply the settings.

TABLE 9. System properties: Session Logon tab

Section	Field Name	Description
Directory Services		The directory service that manages your list of users: Windows Active Directory or Novell Directory Services.
	Domain	The Windows domain, or, for Novell, the preferred NDS Server Name or IP address.
Search Parameters	Search On	The search criterion by which the system searches the user list: ■ Windows Active Directory: First Name, Last Name, Display Name, or Account Name. ■ Novell Directory Services: First Name, Last Name, or User ID.
	Base DN	The base DN (distinguished name), or directory root, which is the starting point of the search. This option defaults to the root of the main tree. Use this option to select the specific DN or Context where you want the search to begin.
	Scope	The scope of the search at one level down from the Base DN or down to the lowest level of the tree.
	Directory Access	The type of access required to retrieve user names from the directory: ■ Anonymous: No user name or password required. This is the default setting. ■ Use Credentials: The user name and password required to access the directory service.
	Search while typing	Enables or disables the Search while typing option at the device.
Authentication Type		The type of authentication required by the server: Windows or Novell. Displays the authentication type selected under Directory Services.

Configuring system tracing

The system can write transaction information to a trace file to help with troubleshooting. You typically use this feature only when you are working with Technical Support. Enabling tracing will slow down overall system performance.

To configure system tracing:

1. In the console tree, select **System Information** > **Properties** and then select the **Tracing** tab.
2. Configure the settings (see Table 10).
3. Click **Save**.

TABLE 10. System information: Tracing tab

Section	Field Name	Description
File Tracing Properties	Off/On	Disables or enables file tracing.
	Directory	The location of the trace file.
	Max. Size	The maximum size of the trace file.

Licensing devices

Every device that you use with eCopy software requires a valid license. To obtain a license, you add a unique product key, valid for use with a single eCopy-enabled device, to the local license database (see page 130). Site licenses, valid for activation with a predefined number of devices, are also available (see page 130). eCopy recommends that you leave the license database on the local hard drive. You activate the product key by obtaining a license code from the eCopy activation Web site (see page 133).

To license a device running ShareScan Embedded software, you must add the device to the Services Manager after entering the product key (see page 132).

A product key must be added to the license database before the Services Manager can assign it to a device. Once the key is assigned to a device, it is no longer available for use with other devices.

Note: If you assign a device to another Services Manager, the license moves with the device.

In the Administration console, the License Information tab displays the status of each product key in the license database (see Table 11). If you are using a ScanStation, a single product key will be listed.

TABLE 11. Product key status options

Status	Description
Activated	The key has been assigned to a device and the license has been activated.
Not Activated	The key has been assigned to a device but the license has not been activated (30 day grace period is in effect).
Expired	The key has been assigned to a device but has expired (you must delete the key and obtain a new key).
Activation Required	The key has been assigned to a device but has not been activated and the 30 day grace period has expired (you must activate the license to use the device).
Blank	The key has not been assigned to a device and is available for use.

Adding product keys

There are three ways to add product keys to the license database:

- Enter each key manually (see page 130). To avoid typing errors, you should copy and paste the key.

  eCopy recommends that you use this method when licensing a device connected to a ScanStation.

- Import the keys from a text file (see page 130). This is the easiest method to use if you receive your product keys electronically. If you buy a 10-pack of the product, you receive a separate CD that contains a text file with the keys that you can import.

  eCopy recommends that you use this method when licensing devices that are running ShareScan Embedded software.

- Use a site license.

  When your organization purchases a site license, you receive a single site key, valid for activation with a predefined number of devices. When you activate the key for a device, eCopy associates the serial number of the device with the site key. When the number of devices associated with the key reaches the predefined limit, you can no longer use the site key to activate devices. To find out how many activations remain on your site license, call Technical Support.

To enter a product key manually:

1. In the console tree, select **System Information** > **Licensing**.
2. Use either of the following methods to enter the product key:
   - Click **<ENTER PRODUCT KEY>** to make the edit field active, enter the product key in the field, and then press ENTER.
   - Click **New Key** and enter the product key in the window that opens.

     The system automatically fills in the remaining fields with information about the product key.

3 Click **OK**.

When you add a product key for a ScanStation, the **Select Source** window opens. Select the appropriate TWAIN driver and then click **Select**. The system adds the ScanStation to the list of devices and then displays the **Product Key Information** window. You can immediately activate the key via the Internet (recommended), or activate it later (see page 133).

When you add a product key for a device running ShareScan Embedded software, the **License Information** tab displays product key information. You must now add the device (see page 132).

To import product keys:

1 Create a text (.txt) file containing all your product keys, or, if you received a CD with product keys, access the text file on the CD. If you received your product keys by e-mail, you can copy and paste them into Notepad and save the file with a .txt extension.

Make sure you enter the product keys accurately. The Load Keys function does not report invalid keys.

2 In the console tree, select **System Information** > **Licensing**.

3 Click **Load Keys**.

The **Open** window opens.

4 Select the text file containing the product keys and then click **Open**.

The **License Information** tab displays the imported keys.

Deleting product keys

You should only delete a key if you are upgrading the license type, for example, if you are upgrading the key from "Evaluation" to "Full Product". If you delete a key that has been activated, you may lose the use of that key.

Note: If you assign a device to another Services Manager, the license moves with the device; therefore, you do not need to delete the key manually.

Adding a device with an embedded Client

An embedded device is a device running ShareScan Embedded software. You can manage multiple devices with embedded Clients from the Administration console. Each device is associated with a Services Manager. New devices, from the same manufactuer, inherit their initial settings from the default device.

To add a device with an embedded Client:

1. Make sure the ShareScan Client is installed and running on the device.
2. In the console tree, select **System Information** > **Licensing** and then verify that you have an available product key of the appropriate type (see page 130.)
3. In the console tree, right-click **Devices** and then click **Add a new device**.

   The Services Manager can detect devices using Multicast UDP or SNMP. While UDP is generally faster, it may not work in certain network environments (see page 322).

   - If the device you want to add is listed, select it and then click **OK**.
   - If no devices are listed, select **SNMP** in the **Protocol** list and then click **Refresh**.
   - If there are still no devices listed, click **Advanced**, enter the name or IP address of the device, and then click **OK**.

   If the device is configured for use with another Services Manager, the system displays a notification message.

   If acquisition of the device has been disabled using the Security Options feature for the Services Manager, ShareScan displays an error message prompting you to contact the administrator for the device. For information about setting security options, see page 121.
4. If access is allowed, click **Yes** to transfer ownership to the current Services Manager.

   An **X** will appear next to the device name in the original Services Manager's device list. The original Services Manager can re-acquire the device only by right-clicking the device name and then clicking **Re-acquire device**; this is because the device no longer appears in the device list.
5. If prompted, click **Activate Now** to activate your license immediately (recommended), or click **Activate Later** to activate your license later (see page 133).

Activating licenses

When you assign a product key to a device, you can activate the device's license immediately (recommended), or you can activate it later. You have 30 days in which to activate the license. Internet activation is fast and easy.

Important! As soon as you activate your licenses, generate a license report (see page 134).

To obtain a license code manually:

1. If you do not have an Internet connection, use the **Report** button on the **License Information** tab to generate a text file containing your product key information.
2. Print the report file.
3. From any computer with an Internet connection, go to https://activation.ecopy.biz and obtain a license code for each key.
4. On the **License Information** tab, activate each license individually.

To activate all licenses via the Internet:

1. On the **License Information** tab, click **Activate**.
2. When prompted, click **Yes** to continue.

To activate a single license:

1. In the console tree, select **System Information** > **Licensing**.
2. On the **License Information** tab, double-click the product key you want to activate.
3. Use one of the following methods to activate the license:
   - If you have an Internet connection, click **Activate via Internet**.

     The system sends information to the eCopy activation Web server, which returns a license code. Use the license code to activate your license.
   - If you do not have an Internet connection, click **Activate Manually** and then follow the instructions for obtaining a license code manually.

Generating a license report

The license report helps you recover your product keys and license codes, if necessary. You should generate a license report whenever you activate your licenses. Keep the report in a safe place in case you need to restore the license information. A printed report is also useful if you need to manually activate product keys from another computer.

To generate a license report:

1. In the console tree, select **System Information** > **Licensing**.
2. On the **License Information** tab, click **Report**.

   The **Save As** window opens.
3. Specify a location for the file.
4. Click **Save**.

Monitoring scanning activity

The Activity Monitor enables you to monitor scanning activity on a Services Manager. This is useful for finding bottlenecks as it shows all activity and timing information in real time.

To access and manage the activity log:

1. In the console tree, select **System Information** > **Activity Monitor**.

   The **Activity** area displays a list of all requests and status information.

2. Click **Start Monitoring** or **Stop Monitoring**.
3. In the **Filter** list, select "none" to view activity for all Services Managers or select a specific Services Manager whose activity you want to view.
4. To send a text version of the activity log to a file, right-click in the list and then select **Send to File**.

   The **Save As** window opens.

5. Select a location and file name for the activity log and then click **Save**.
6. Click **Clear** if you want to clear all existing entries from the activity log.

Reporting scanning activity

The Reporting function enables you to display the total number of pages scanned. The report can include activity for all devices connected to a Services Manager or for a single device.

To view a report of scanning activity:

1. In the console tree, select **System Information** > **Reporting**.
2. Select the appropriate option:
   - **Manager:** Displays the total number of pages scanned at each device connected to the selected Services Manager.
   - **Device:** Displays the total number of pages scanned at the selected device. After selecting a device, specify the time period for which you want to create the report.
3. Click **Print** to print the current bar graph.
4. Click **Refresh** to update the graph to reflect recent activity.

Backing up and sharing configuration files

The Export / Import utility enables you to perform the following administrative tasks:

- Copy configuration files to a backup directory.
- Restore the Services Manager to a previously-saved configuration.
- Copy configuration files to other Services Managers.

The configuration files include the following items:

- The system profile and forms, System*.xml.
- The profiles and forms associated with all installed connectors, <*connector*>*.xml.
- All image files used by the connectors.

Important! When you import connector profiles and forms, the imported information overwrites the existing information.

To export files:

1. To access the utility, use either of the following methods:
   - Select the Services Manager and then click the **Export or Import Profiles** icon on the Administration console toolbar.

   - Right-click the Services Manager and then select **Export / Import Utility**.

   The **Export / Import Utility** window opens.
2. Click **Export configuration**.
3. Select the items and connectors to back up.
4. Select the target folder.

   If you are copying files to share with other Services Managers, select a shared folder that the other Services Managers can access.
5. Click **Export**.

   ShareScan creates a time-stamped subdirectory within the target folder and copies the specified files from the \Data and \Images folders associated with each selected connector, including the System connector.
6. When the copying is complete, click **Done**.

To import files:

1. To access the utility, use either of the following methods:
   - Select the Services Manager and then click the **Export or Import Profiles** icon on the Administration console toolbar.

   - Right-click the Services Manager and then select **Export / Import Utility**.

   The **Export / Import Utility** window opens.
2. Click **Import configuration**.
3. Select the files and connectors to import.

   If you are importing files that were exported from another Services Manager, the utility does not import system data.
4. Select the folder containing the files you want to use.
5. Click **Import**.
6. Click **Yes** to shut down the Services Manager while the files are imported.

   ShareScan will restart the Services Manager when the import is complete.
7. Click **Done**.

Remote administration

When the Services Manager, the Administration console, and all available connectors are installed on a network computer, for example, in an information technology (IT) department, you can perform the following tasks for eCopy-enabled devices on the network:

- Connect remotely to a single device and configure its system properties.
- Connect remotely to a single device and configure its device properties.
- Publish sets of connector profiles to multiple devices.

Note: You cannot configure connectors from an Administration console that is installed on a remote computer.

Setting up remote administration involves installing ShareScan on a remote computer and then granting the appropriate access rights.

By default, remote access to the Services Manager is limited to domain administrators. A domain administrator must grant access rights to anyone else who needs remote access to a Services Manager.

The only users who need remote access rights are those who will configure system and device properties. Users who publish connector profiles do not need remote access rights.

To provide users with remote access to a Services Manager:

1 To select the users to whom you want to provide remote access, use either of the following methods:

- Select the Services Manager and then click the **Displays user list for remote access** icon on the Administration console toolbar.

- Right-click the Services Manager and then click **Display user list**.

The **Select Users** window opens.

2 In the **Domain** list, select your domain controller.

3 In the **Name** field, enter the first few letters of the first name of the person whose name you want to add to the list.

The system displays all the names that match the letters you entered.

4 Select a user and then click **Add**

The system adds the user to the user list.

5 Repeat steps 3 and 4 until you have added all the names you require to the list and then click **OK**.

To remove a user from the user list:

1 To display the user list, use either of the following methods:

- Select the Services Manager and then click the **Displays user list for remote access** icon on the Administration console toolbar.

- Right-click the Services Manager and then click **Display user list**.

The **Select Users** window opens. The list box displays the users who have been granted remote access.

2 Select the user you want to remove from the list.

3 Click **Remove**.

Reference: Common configuration information for connectors

An eCopy™ ShareScan system can use the following types of connectors:

- eCopy Connectors that are included with the ShareScan product. The following connectors are supplied on the ShareScan CD: Mail via Microsoft Exchange, Fax via Microsoft Exchange, Lotus Notes Mail, Fax via Lotus Notes, Mail via SMTP using LDAP, Fax via SMTP, Fax via Print, Scan to Printer, Scan to eCopy Desktop, and Copy.
- The following connectors are also available for download or purchase, depending on your version of ShareScan: Quick Connect, Captaris™ RightFax™, Microsoft® SharePoint®, Livelink ECM™, Interwoven WorkSite, OpenText™ Livelink ECM™-eDOCs DM, EMC® Documentum®, and Canon® imageWARE™.
- Third-party connectors, developed using the ShareScan Software Development Kit (SDK).

You configure connectors by creating connector profiles that specify various settings, such as the appearance of the connector's button and the image format that you want to use during scanning. You can create multiple profiles for each connector and you can activate each connector profile on multiple devices. You can also publish groups of connector profiles to all eCopy-enabled devices on the network.

In this chapter

- Installing and removing connectors 142
- Configuring connector profiles. 144
- Configuring common Properties settings. 148
- Configuring connector Services 165

Installing and removing connectors

During initial installation of the ShareScan software, you can install any of the eCopy Connectors supplied on the installation CD (see page 34). To install a connector supplied with the ShareScan installation CD that you did not install during the initial installation of ShareScan, you use the Program Maintenance option. You access this option through the Add or Remove Programs function in Control Panel or by running the ShareScan installation program again.

This topic also provides instructions on how to install connectors purchased separately and supplied on their own CD. Depending on your version of ShareScan, you may also be able to download connectors. For more information on downloading connectors please see the instructions provided with your ShareScan CD.

To install a connector from the ShareScan CD after initial installation:

1. In **Control Panel**, select **Add or Remove Programs**.
2. Select **eCopy ShareScan** and then click **Change**.
   The Wizard's **Welcome** window opens.
3. Click **Next**.
   The **Program Maintenance** window opens.
4. Click **Modify** and then click **Next**.
   The **Custom Setup** window opens.
5. Select the connectors that you want to install and then click **Next**.
6. Click **Install** and then follow the instructions.

To remove a connector supplied on the ShareScan CD:

1. In **Control Panel**, select **Add or Remove Programs**.
2. Select **eCopy ShareScan** and then click **Change**.
   The Wizard's **Welcome** window opens.
3. Click **Next**.
   The **Program Maintenance** window opens.
4. Click **Modify** and then click **Next**.
   The **Custom Setup** window opens.
5. Select the connectors that you want to remove and then follow the instructions.

To install an eCopy Connector from a separate CD:

If you are installing any connector other than those supplied on the ShareScan CD, run the setup program and follow the instructions. The setup program installs the software and registers it on the Services Manager. The connector then appears in the console tree.

To remove an eCopy Connector supplied on a separate CD or by download :

1. Run the connector's installation program and then select the **Uninstall** option.
2. When the uninstall process is complete, run ShareScan Administration.

   The **Remove** icon appears next to the name of the connector that you uninstalled. It indicates that the connector has been uninstalled or is otherwise unavailable
3. In the console tree, right-click the name of the connector you uninstalled and then click **Delete** to remove it from the Connectors node.

To refresh the list of connectors:

To refresh the list of connectors, use either of the following methods:

- In the console tree, right-click **Connectors** and then click **Refresh Connectors**.
- Select the Connectors node and then click the **Refresh connectors** button on the Administration console toolbar.

Configuring connector profiles

Each connector profile defines a set of configuration options for that connector. You can configure multiple profiles for each connector. In addition, you can activate multiple profiles for each connector on a single device. For example, you can create two unique profiles for the Exchange connector and activate both on Device X.

TABLE 12. Two profiles for the same connector activated on a single device

Profile Name	Profile Description	Device
Expense Reports	Scans and sends expense reports to a Payroll inbox.	Device X
Resumes	Scans and sends resumes to a Human Resources inbox.	Device X

Configuring and updating connector profiles

Before you can activate a connector profile on a device, you must configure and save at least one profile for the connector. After you configure a profile, it is available for activation in the device's Properties window.

You can use the Copy to option to copy settings between profiles for the same connector (see page 165).

To configure and save a new profile:

1. In the console tree, select the connector for which you want to create a profile.
2. Select **Properties**, specify the settings for the profile, and then click **Save**.

   The **Save Profile** window opens.
3. Enter a name for the new profile.
4. Click **Save** to save the changes to the profile.
5. Select **Services** and then specify the settings for the profile.
6. Click **Save** to save changes to the profile.

To update an existing profile:

1. In the console tree, select the connector whose profile you want to modify.
2. In the list of profiles, select the profile you want to modify.
3. Update the **Properties** settings and then click **Save**.
4. In the **Save Profile** window, select the target profile and then click **Save**.
5. Update the **Services** settings and then click **Save**.

> **Note:** If you update the Services settings before updating the Properties settings and you then click Save, the Save Profile window opens. You must then select the target profile.

Activating connector profiles

To make connector profiles available at a device, you activate the connectors and then select the connector profiles. You can activate up to nine connector profiles on each device.

Each connector profile that is activated on a device is represented by a separate button on the touch screen. While you can create as many profiles as you like for a connector, you can activate a maximum of nine connector profiles on a single device.

To activate connector profiles:

1. In the console tree, select **Devices** > <*device_name*> > **Properties**.
2. Select the **Selection** tab and then select the **Activate Connector** check box for the connector that you want to activate.

   The **Select Connector Profiles** window opens.
3. In the **Select Profiles** column, select the connector profile that you want to activate.
4. If your company uses Document Services, use the **Select a Document Service Profile** list to select the Document Service profile that you want to associate with the connector profile. For more information on Document Services, see page 147.

   The Document Service profile name appears next to the connector profile name in the table.
5. Click **OK** and then click **Save**.

   You can only select configured profiles, which appear in black. Unconfigured profiles appear in red.

6 Select the **Selection** tab and then click **Arrange**.

The **Arrange Profiles** window opens.

7 Use the **Move Up** and **Move Down** buttons to arrange the profiles in the list in the order in which you want the connector buttons to appear on the touch screen and then click **Save**.

8 Select the **Selection** tab and then click **Save**.

The profile is activated on the device.

Note: You can publish connector profiles individually or in groups to one or more eCopy-enabled devices (see page 262).

Configuring Document Services

When you purchase and install a Document Service, the service is visible from the Document Services node in the Administration console tree. ShareScan enables you to create profiles for the document service and associate them with your connector profiles. When a user at the device scans a document using a connector with an associated document service, the document is scanned, processed by the document service, and then passed to the connector workflow.

An example of a Document Service is an Image Processing Service from a third-party vendor that you want to integrate into your workflow to perform functions like document modification and enhancement (line removal, de-skew, de-speckle, anti-aliasing etc.) on your scanned documents.

To learn more about Document Services, please contact your eCopy vendor.

To configure a Document Service

1. In the console tree, select **Document Services** and then double-click the document service you want to configure.

   The configuration tabs for the service open in the right pane. The available tabs and settings will vary depending on the service.

2. Configure the service settings.
3. Click **Save**, select or specify the Document Service profile name, then click **Save**.
4. When you activate a connector (see page 145), you can now associate the Document Service profile with the connector profile for use at the device.

Note: You can only associate a single Document Service profile with a single connector profile.

Configuring common Properties settings

This section describes how to configure the properties and operations that are common to multiple connectors.

- Display (see page 149)
- Content (see page 150)
- Express (see page 152)
- Search while typing (see page 155)
- Field creation (see page 156)
- Fax address format (see page 158)
- Support for address books via SQL Express (see page 160)

For a table that lists each setting and the connector that uses it, see the "About configuring general Properties settings" topic in the Administration console Help.

Common functions

The following table describes functions that are common to many ShareScan operations.

TABLE 13. Common functions

Function	Description
Defaults	Restores the default settings, such as the Display properties. Deletes any custom entries.
Edit	Edits the selected entry.
Delete	Deletes the selected entry.
Move Up	Moves the selected entry up in a list. The top item in a list is the default.
Move Down	Moves the selected entry down in the list.

Configuring the Display properties

The Display tab specifies the image and label that will be used on the connector button, which appears on the touch screen.

To configure the Display properties:

1. In the console tree, select <*connector_name*> > **Properties**.
2. Select the **Display** tab and then specify the settings (see Table 14).
3. Click **Save**, select or specify the profile name, and then click **Save**.

TABLE 14. Connector Properties: Display tab

Field	Description
Image	Used to select a .gif or .jpg file. .gif files have the advantage of transparency. Maximum dimensions for the image are 64x64 pixels.
Label	Used to enter up to three short lines of text. Press ENTER between each line. To make sure the lines of text fit on the button, save the connector profile, activate the connector, and then view the button on the device's touch screen.

Configuring the Content properties

The Content tab specifies the properties for subjects, notes, and bylines that are included in messages sent by e-mail and fax connector profiles. Users at the device can select an existing subject or note or enter their own subject or note. Subjects appear on the subject lines; notes are included in the message body.

To configure the Content properties:

1. In the console tree, select <*connector_name*> > **Properties**.
2. Select the **Content** tab and then specify the settings (see Table 15).
3. Click **Save**, select or specify the profile name, and then click **Save**.

TABLE 15. Connector Properties: Content tab

Section	Field/Button	Description
Message For e-mail connectors, the Subject and Notes options appear in the Message list. For fax connectors, only the Subject option appears in the Message list. **Cover Sheet Notes** (applies only to the RightFax Connector)	Add	Adds a new subject or note to the list of subjects and notes available to the user at the device. You can use the following variables: ■ $$USER_NAME$$: Can be used in a subject line or in a note. Replaces the variable with the sender name. ■ $$RECIPIENTS$$: Can be used only in a note. Replaces the variable with the recipient name(s). You can use this variable, however, in a RightFax Connector cover sheet note. ■ $$FILESIZE$$: Can be used in a subject line or in a note. Replaces the variable with the size of the file (in KB). ■ $$FILENAME$$: Can be used in a subject line or in a note. Replaces the variable with the name of the file. ■ $$PAGECOUNT$$: Can be used in a subject line or in a note. Replaces the variable with the number of pages in the document.

TABLE 15. Connector Properties: Content tab (continued)

Section	Field/Button	Description
Email Address Format in Message Content (applies to the Lotus Notes Mail Connector)		Determines how recipient names will appear in the body of the message when the $$RECIPIENTS$$ variable is included. **Tip!** When you send mail to multiple recipients from a personal Lotus Notes account, the eCopy agent on the Domino server creates an individual message for each recipient. Including the $$RECIPIENTS$$ variable in a note enables recipients to see who else received the message.
	Name@Domain.com	Displays the recipient's Internet e-mail address.
	FirstName MI LastName	Displays the recipient's "friendly" name, as it appears in the Lotus Notes address list. If the name does not appear in the Lotus Notes address list, the recipient's Internet e-mail address appears.
Byline (applies only to e-mail connectors)		Appears at the bottom of the message body. The byline used depends on the format of the scanned document attachment.
	Custom	Includes the specified byline for scanned documents whose format is PDF or TIFF.
	Enable .cpy file format byline	Includes the standard eCopy byline for scanned documents whose format is eCopy (CPY). The standard byline is: "To view .cpy files, download the latest free eCopy Viewer at: http://www.ecopy.com/downloads/viewer."

Configuring the Express properties

The Express function enables you to reduce the amount of time that your users spend at the device. You do this by enabling Express in a connector profile and specifying information, such as a recipient's name, on the Express tab. The profile enables the user at the device to scan and send documents without having to enter additional information.

Note: When you configure an Express profile for a connector and Session Logon is enabled for the system, users must still enter their session logon credentials on the main ShareScan Logon screen.

You can configure multiple profiles with Express enabled. Each profile can store documents in different locations.

Depending on the connector, the Express tab enables you to preconfigure information that accompanies the scanned document.

To configure the Express properties:

1. Configure the properties on all the other tabs for the connector profile.

   If you configure Express first and then try to save the profile, the system will display an error message and you will not be able to save the profile.
2. Select the **Express** tab.
3. Select **Enable** and then specify the settings (see Table 16). The available settings depend on the connector.
4. Click **Save**, select or specify the profile name, and then click **Save**.

TABLE 16. Connector Properties: Express tab

Connector	Field/Button	Description
eCopy Connectors for: **Microsoft Exchange** **Lotus Notes** **SMTP using LDAP**	Subject	The subject line for the e-mail to which the scanned document is attached.
	Note	The text included in the body of the e-mail to which the scanned document is attached.
	To:	List of e-mail addresses that will receive the e-mail. To add more recipients, press Add and then use the Add Recipients window to add recipients from your address book. See "Express Add Recipients settings" in the Connector Help.
	Cc:	

TABLE 16. Connector Properties: Express tab (continued)

Connector	Field/Button	Description
eCopy Connectors for: Fax via Microsoft Exchange Fax via SMTP	Destination List	When you enable the Express mode, you can use the available buttons to add, edit, remove, and change the positions of the destinations in the Destinations list.
	Fax Destination window	The window opens when you click the Add or Edit buttons. The window enables you to name your destination, add account information, and enable and configure a cover sheet for the destination.
eCopy Connector for Fax via Lotus Notes	Subject	The subject line for the fax to which the scanned document is attached.
	Fax Number	The fax number to which the scanned document is sent.
	Attach Cover Page/Sheet	Attaches a cover page to the fax.
eCopy Connector for Captaris™ RightFax™	Billing Code 1	Includes the first billing code set on the Billing Codes tab.
	Test	Tests that the billing code is correctly configured for RightFax. When you click Test, the labels of the Billing Code 1 and Billing Code 2 fields change to reflect the field titles shown on the Configure tab.
	Billing Code 2	Includes the second billing code set on the Configuration tab.
	Description	Describes the billing code.
	Name	The name of the fax recipient.
	Fax Number	The fax number to which the scanned document is sent.
	Note	The text included in the body of the fax to which the scanned document is attached
	Attach Cover Sheet	Attaches a cover page to the fax. A cover sheet can only be sent if the Use Cover Sheet option is enabled in the RightFax FaxUtil client for the authenticated user (see your RightFax documentation).

Setting up Scan to eCopy Desktop with Express functions

There is no separate Express tab for the Scan to eCopy Desktop Connector. The following procedure enables you to configure Scan to eCopy Desktop to use Express functions.

To configure Scan to eCopy Desktop to use Express:

1. In the console tree, select **System Information** > **Properties** and then select the **Session Logon** tab.
2. Configure Session Logon (see page 126).
3. In the console tree, select **Scan to Desktop > Properties** and then select the **Configure** tab.
4. You can create an Express connector profile for a scan inbox or for a destination folder.

   To create an Express connector profile for a scan inbox:

   - Select **Scan Inbox/Home Folder Settings** and then click the **Properties** button.

     The **Scan to Desktop Properties** window opens.
   - Configure and test the Environment Settings.
   - Select the **General Settings** tab and then select **Scan to Self** as the **Recipient Type**. **Authenticate Users** is selected automatically.
   - Click **OK** to return to the **Configure** tab.

   To create an Express connector profile for a destination folder:

   - Select **Destination Settings** and then click the **Properties** button.

     The **Scan to Desktop Properties** window opens.
   - Select a destination folder and make sure that **Enable subfolder navigation** is not selected.
   - Select one of the following user authentication options: **None**, **Runtime credentials from Scan to Desktop**, **Service account from Scan to Desktop**.

     These options do not require the user to provide credentials at the device.
   - Test the credentials and then click **OK** to return to the **Configure** tab.
5. Click **Save**, select or specify the profile name, and then click **Save**.

Configuring the Search while typing option

The Search while typing option enables ShareScan to automatically search for matching address list entries after each character the user enters. This is a useful feature when the user is searching a long list for an entry. The user does not have to type the entire name in the field.

Example:
A user wants to enter "Chris Levesque" in a user name field. As the user enters "c", the Client displays the first address entry that begins with "c". As the user enters "h", the Client displays the first address entry that begins with "ch". As the user enters "r", the Client displays the first address entry that begins with "chr". If there are multiple users with the name "Chris", the user can press the down arrow and select "Chris Levesque".

eCopy recommends that you select this option only when the address list server responds fast enough to allow rapid auto-completion.

By default, this option is enabled. If you do not want to use it, you must clear the Search while typing check box.

If the Search while typing option is not enabled, a user can manually activate the option. If the ScanStation Client is configured to use the hard keyboard, the user enters one or more characters and then presses the Search icon. If the Client is configured to use the on-screen (soft) keyboard, the user enters one or more characters and then presses the Search button.

Example:
A user enters "c"' and nothing happens. The user then presses the Search icon or button. The Client then fills in the field with the first address list entry beginning with "c".

Configuring file name and index fields

You use the Field Editor or the Index Field Editor to add or edit fields that the user sees in the Client. When you create file name fields or index fields, you select the field type in the editor.

The following fields are available in the Field Editor window:

TABLE 17. Field Editor options

Section	Field	Description
Properties	Name	The identifier for the field (15 characters maximum).
	Type	The field type (see Table 18).
	Default	The default value (optional).
	User modify	Enables the user to modify the default value.
Field Size	Minimum	The minimum number of characters allowed.
	Maximum	The maximum number of characters allowed.
	Remember	The number of most recently used values to display in the drop-down list.

The following table lists all available field types. Each editor supports a unique group of field types.

TABLE 18. Field Editor: Available field types

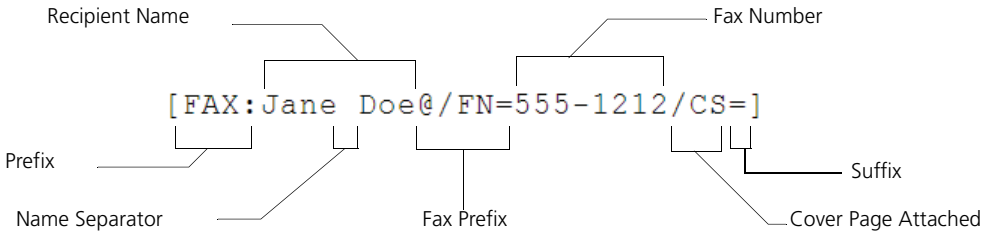
Field Type	Available Settings
Alphanumeric	Field size: The minimum and maximum number of characters allowed. Remember: The number of previous entries to display when the user is prompted for the naming information. If set to zero, no previous values appear in the drop-down list.
Batch Number	Length: The maximum number of digits allowed for the batch number, including leading zeroes. Leading zeroes: Pads all values with leading zeroes to make their length equal to the maximum field size. For example, if you specify "3" in the Length field and you enable leading zeroes, batches are numbered "001", "002", … , "010", "011", … , "100", "101", … , "999". If you do not enable leading zeroes, batches are numbered "1", "2", etc.
Database	The database location in which the list of values for the field is stored. Only available in Quick Connect.
Date	Format: The appropriate date format according to local conventions.
Destination Path	The path to the network location where the document is stored.

TABLE 18. Field Editor: Available field types (continued)

Field Type	Available Settings
Device Name	No additional settings.
File Name	The name of the scanned file.
File Size	The size (in KB) of the scanned file.
List	Required: If you select this option, the user at the device must select a value from the list. If you do not select this option, the user at the device can leave the field blank. If you select the Required option and do not want to select the User Modify option, you should set one of the list items as the default value. Creates a new list entry. Deletes the selected list entry.
Logged on User	The user whose credentials were used to scan the document at the device.
Number of Pages	The number of pages in the scanned document.
Numeric	Field Size: The minimum and maximum number of digits allowed. Leading zeroes: Pads all values with leading zeroes to make their length equal to the maximum field size. Remember: The number of previous entries to display when the user is prompted for the naming information. If set to zero, no previous values appear in the drop-down list.
Separator	Value: The field separator character.
Time	Format: The time format.

Configuring the fax address format

For fax connectors, you must define the fax address format required by your fax server application or Internet fax service. A sample format is shown below:



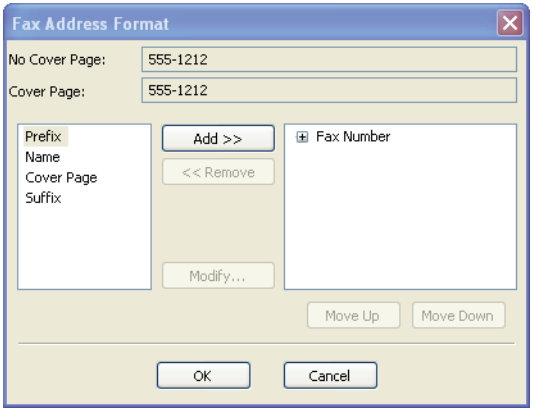
To configure the fax address format:

You configure the fax address format in the Fax Address Format window. The following table shows the location of the window for each fax connector:

TABLE 19. Fax Address Format window access

Connector	Window access
Fax via Microsoft Exchange	From the connector Wizard or on the Fax Format tab of the Fax via Exchange Properties window.
Fax via Lotus Notes	On the Fax Format tab in the connector's Properties window.
Fax via SMTP	From the connector Wizard or on the Fax Format tab of the Fax via SMTP Properties window.

1 Open the **Fax Address Format window**..



2 Refer to the documentation for your fax server application to obtain the correct format for fax addresses.

> **Important!** Since fax application vendors change these formatting schemes frequently, make sure you obtain the current format.

3 Start building the address by adding components. For example, to include a prefix, select **Prefix** from the list on the left and then click **Add**.

4 To change the order of the fax address components, select a component and then click **Move Up** or **Move Down**.

5 For each component, perform the following tasks:

- Select the **Value** field (for example, Fax Prefix Value).
- Click **Modify**.

  The **Modify Value** window opens.
- Enter the appropriate prefix value.
- Click **OK**.

The completed string appears in the **Fax Address Format** window.

6 When you finish building the fax address, click **OK** to close the window.

Configuring support for local address books

ShareScan supports the use of Microsoft SQL Server Express 2005 (SQL Express) for the storage of e-mail and fax addresses in local address books.

Important! You must use the version of the SQL Express installation program that is provided on the ShareScan CD and accessed through the Optional Components menu. Using any other method of installation, such as downloading SQL Express from the Internet, will not provide the configuration settings required for SQL Express to work correctly with ShareScan.
If you are using Microsoft Windows 2000, you must install MDAC 2.8 because it is not included with Windows 2000.

When enabled, the ShareScan address book stores e-mail addresses and fax numbers typed in at the eCopy-enabled device. This enables users at a device to select addresses and fax numbers from a local address book instead of having to type a recipient's complete address or fax number each time.

All Services Managers can share the address book database, which can be on any computer on your network. However, you may choose to create multiple databases on the same SQL Express installation. For example, you may choose to create one database for the Engineering department and another database for the Sales department. If you are using a combination of e-mail and fax connectors, eCopy recommends that you create a separate database for each department.

Note: All e-mail and fax connectors provided by eCopy, Inc., include global address book support that enables users at an eCopy-enabled device to select recipients from a Global Address List. Therefore, you do not need to configure SQL Express for global address book support. You only need to configure SQL Express for local address book support.

Installing SQL Express

You must install SQL Express using the ShareScan installation program.

To install SQL Express:

1. Insert the ShareScan installation CD into the CD drive and then click **Optional Components**.
2. Select **Install SQL Express** and follow the on-screen instructions.

   During installation, SQL Server prompts you for a password. You will need this password when you create an address book database. The password must contain a minimum of 6 characters and must include alpha and numeric characters.

Note: The version of SQL Express provided with ShareScan does not require any further configuration. However, should you need to check the configuration settings, you can access the SQL Server Configuration Manager from the Start menu of your computer. For more information on the installed SQL product, see the Help file available from the Help menu in the SQL Server Configuration Manager.

Creating a local address book database

You can create a local address book database on any PC running the Services Manager. Once you have created the database, it is available to all other Services Managers on the network.

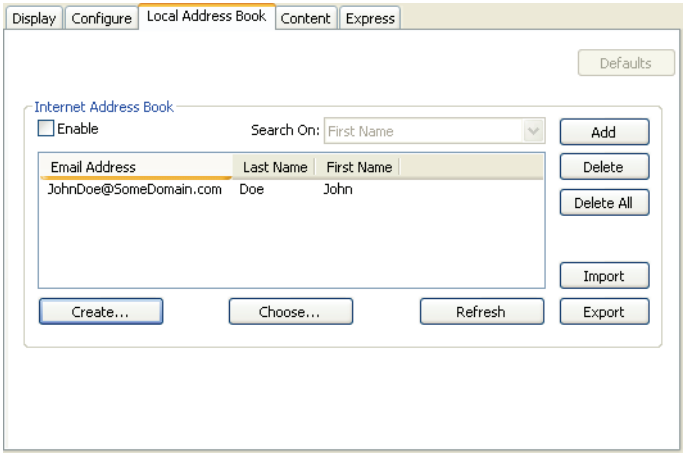
Note: SQL Server must be running when you create the database.
If you are using a firewall, you must add SQLSERVER.exe and UDP Port 1434 to the exceptions list.

To create a local address book database:

1. In the console tree, select your e-mail or fax connector, select **Properties**, and then select the **Address Books** or **Local Address Book** tab.
2. Under **Local Address Book** or under **Address Books** (for Lotus Notes connectors), click **Create**.

   The **Create an Internet/Fax Address Book Database** window opens.
3. Specify the settings (see Table 20) and then click **Create**.
4. To use the new address book with the current Services Manager, click **Connect Now**.

   After connecting to the database, a sample entry appears.



5. To enable the local address book for use with the connector, select **Enable** (see Table 21).
6. Click **Save**, select or specify the profile name, and then click **Save**.

TABLE 20. Settings for creating a local address book database

Field/Button	Description
SQL Server Name list	The computer where you installed SQL Express. If the server name does not appear on the list, you can enter it manually. You must add the suffix \SQLEXPRESS to the server name. For example: *mycomputer*\SQLEXPRESS.
Administrator's user ID	User name: **sa** Password: The password you entered when you installed SQL Express.
Address Book Name	The name you select for the address book.

The following table documents all the settings on the Address Books and Local Address Book tabs, including the settings for the Lotus Notes Address Book and the LDAP Directory.

TABLE 21. Settings for enabling address books

Field/Button	Description
Enable	Enables users to search for and select recipients from the specified address book. In addition, when a local address book is enabled, you can add, delete, import, and export addresses that will then be available at the device. An imported address list must be a text file with a list of comma-separated values (CSV) in the following format: ■ E-mail connectors: Last_Name,First_Name,Email_Address ■ Fax connectors: Last_Name,First_Name,Fax_Number You export an address book database to a CSV file.
Search On (available for Internet address books and Lotus Notes Address Books)	The address book field against which you want the connector to search for addresses. The available fields depend on the connector. How ShareScan searches for a matching name depends on the Search Behavior setting.
Address Book (available for Lotus Notes Address Books)	Selects the Global Address List.
Search (available for Lotus Notes address books)	Enables or disables the Search while typing option at the device (see page 155). **Note:** For the Exchange mail and fax connectors, and for the SMTP mail and fax connectors, the Wizard auttomatically activates the Search while typing option. You can configure the option manually on the Basic Settings tab of the Properties window.

Configuring connector profiles to use address books

After creating and enabling address books, you can configure connector profiles to use them.

To configure connector profiles to use address books:

1. In the console tree, select your e-mail or fax connector, select **Properties**, and then click the **Local Address Book** or **Address Books** tab.
2. Under **Local Address Book** or **Address Book** (for Lotus Notes connectors), click **Choose**.

   The **Data Link Properties** window opens.
3. Select the **Provider** tab and then select **Microsoft OLE DB Provider for SQL Server**.
4. Select the **Connection** tab and then specify your connection settings (see Table 22).
5. Click **OK** to close the window.
6. To verify that you can manually add an entry to the address book, click **Add**, enter user information in the **Add a Contact** window, and then click **Add**.

7. If the address book is not enabled, select **Enable**.
8. Click **Save**, select or specify the profile name, and then click **Save**.

TABLE 22. Data Link Properties window: Connection tab

Step	Option	Description
Select or enter a server name.		The name of your server.
Enter information to log on to the server.	Use a specific user name and password	User name: **sa** Password: The password specified when you installed SQL Express.
	Allow saving password	Required for correct configuration of the address book.
Select the database on the server.		The address book that you want the connector to use.
	Test Connection	Tests the connection.

Configuring connector Services

This section describes how to configure the connector Services that are common to multiple connectors.

- Document Settings (see page 166)
- Scanner Settings (see page 170)
- Tracing settings (see page 171)

Copying Services settings

Each connector profile can have its own set of Services settings. When the settings are similar between connector profiles, you may want to copy them. The Copy To button in the Services pane enables you to copy settings. (If you have configured only one profile for the selected connector, the button is not available.

To copy Services settings

1. In the console tree, select <*connector_name*> > **Services**.

   The **Services** pane appears.
2. Select the connector profile whose settings you want to copy.
3. Click **Copy To**.

   The **Copy Services Settings** window opens. The **Copy From** field displays the name of the currently selected connector profile.
4. In the **To** list, select the target profile.
5. In the **Select Profile Settings** area, select each profile setting (Document Settings, Scanner Settings, or Tracing) that you want to copy to the target profile.
6. Click **OK**.

   The **Services** pane appears.
7. Select the target profile and then click **Save**

Configuring Document Settings

The Document Settings tab enables you to specify default settings for options specific to a connector profile, including encryption, searchable text, and image format. It also enables you to specify whether users at the eCopy-enabled device can change the settings; user-modifiable options are available when the user presses the Services button on the Client's scan preview screen.

Note: Each connector profile supports a unique group of settings.

To configure the default Document Settings:

1. In the console tree, select <*connector_name*> > **Services** and then select the **Document Settings** tab.
2. Specify the default settings (see Table 23). To find out which settings are available for each connector, see the Document Settings Matrix topic in the Help.
3. Click **Save**, select or specify the profile name, and then click **Save**.

TABLE 23. Services: Document Settings tab

Option	Setting	Description
Encryption (for PDF and eCopy file formats only)	On	Prompts the user to enter an encryption password. All scanned documents will be encrypted. If you also select the User modify option, the user can choose encryption on a document by document basis.
	Off	Document encryption will not be available for use with the profile.
	User modify	The user can override the default setting.
	Document Security	Sets document passwords and permissions (see the Document Security Settings topic in the Connector help).
Searchable Text (for PDF, PDF/A, and eCopy file formats only)	On	Processes all scanned documents using the OCR engine and embeds searchable text in the file. If you also select the User modify option, the user can choose whether to make the document text searchable on a document by document basis.
	Off	Searchable text will not be available for use with the profile.
	User modify	The user can override the default setting.
File Format	TIF Fax TIF PDF PDF/A eCopy	Specifies the default format. TIF Fax supports Group3 2D 1-bit. TIF supports Group4 2D 1-bit, GrayScale 8-bit, and Color 24-bit. If you select a TIF option, you must disable the Searchable Text and Encryption options; they are not compatible with the TIF format. Color pages that are scanned using the PDF or eCopy format are automatically compressed.
	User modify	The user can override the default setting.

TABLE 23. Services: Document Settings tab (continued)

Option	Setting	Description
Document Name	Default	The default naming format for the scanned documents: *DeviceName_ConnectorID_<DateTime>*.ext
	Specify Name	Specifies a default file name for the scanned documents.
	Advanced	Specifies the fields that are used to build a file name for the scanned documents. You use the Add/Edit File Name Fields window and the Field Editor to specify the fields. See the Advanced file naming settings topic in the Help for more information. The system adds the Authenticated User name to the file name only if Session Logon is enabled.
	User modify	The user can override the default setting. Only available if you select the Specify Name option.
Blank Page Removal (for black-and- white documents only)	On	Removes blank pages from the scanned documents when the file size is within the range specified in the Threshold field.
	Off	Retains blank pages in the scanned documents.
	Threshold	If Blank page removal is set to "On", the Threshold value is the size of the file, in kilobytes, that triggers a search for blank pages. The threshold can be an absolute value or a range, for example: "10" or "10-25".
	User modify	The user can override the default setting.
Bates Numbering	On	Will be available for use with the selected profile. When Bates Numbering is enabled, the Bates Numbering button appears on the Client's scan preview screen.
	Off	Will not be available able for use with the profile.

TABLE 23. Services: Document Settings tab (continued)

Option	Setting	Description
Batching (for PDF and eCopy file formats only)	On	Will be available for use with the profile.
	Off	Will not be available for use with the profile.
	Number of pages	Creates a new document after the specified number of pages. You specify the number of pages by clicking the Pages button and entering the number.
	File size	Creates a new document when the file reaches a specified size. You specify the file size by clicking the Size button and entering the size, in kilobytes (KB).
	Blank page	Creates a new document when the system finds a blank page within the range specified in the Threshold field. For black-and-white documents, if the Blank Page Removal option is set to "On", the blank pages that divide the documents are removed from the final scanned document(s).
	User modify	The user can turn batching on or off, but cannot change the type of batching.
Document Tracking (not available for the Copy connector)	On	When Activity Tracking is enabled for a device, this option creates a black-and-white PDF file, without encryption or searchable text information, and stores the file in the folder specified on the Document Tracking tab (in the Activity Tracking pane). The name of the PDF file is added to the Activity Tracking log.
	Off	Disables Document Tracking. Activity Tracking, which is a separate feature, may still be enabled.

Configuring Scanner Settings

The Scanner Settings tab enables you to attach default scanner settings to a connector profile. For example, assume that a user always scans to Legal size paper with the scaling option set to 90%. You can specify the settings in a profile so that the user at the device does not have to change them.

If the device does not support a setting that you specify in the profile, the connector uses the device's default settings.

To configure the default Scanner Settings:

1. In the console tree, select <*connector_name*> > **Services** and then click the **Scanner Settings** tab.
2. Specify the default settings (see Table 24).
3. Click **Save**, select or specify the profile name, and then click **Save**.

TABLE 24. Services: Scanner Settings tab

Setting	Description
Enable Scanner Settings	Activates the scanner settings for the profile.
Input Paper Size	Paper sizes currently supported by the Services Manager. The default setting is "Use Default", which enables the profile to use the device's default setting for this option.
Output Paper Size	Paper sizes currently supported by the Services Manager. The default setting is "Use Default", which enables the profile to use the device's default setting for this option.
Scaling	Available values between 20 and 100 percent.
Resolution	Supported resolutions between 100 and 600 dpi.
Two-Sided	Standard options, for example: single-sided, double-sided (book type) and double-sided (calendar type).
Color Depth (Pixel)	Supported color types.

Configuring Tracing settings

The Tracing tab enables you to configure the capture of trace information in a log file; this information helps troubleshoot connector issues. You typically do this only when working with Technical Support. Tracing will slow down overall system performance.

To configure the Tracing settings:

1. In the console tree, select <*connector_name*> > **Services** and then select the **Tracing** tab.
2. Specify the default settings (see Table 25).
3. Click **Save**, select or specify the profile name, and then click **Save**.

TABLE 25. Services: Tracing tab

Section	Field Name	Description
Enable Tracing	On/Off	Enables or disables tracing.
File	Daily	Creates a new log file each day.
	Unlimited file size	Adds all log entries to a single file.
	When file size reaches	Creates a new file when the file size reaches the specified limit.
	Rolling filenames	If Tracing is configured for the automatic creation of new files, appends a numeric identifier to ensure uniqueness of file names.
Log file Location		Specifies the folder where log files will be stored.

Reference: Connector-specific configuration information

This section provides information about configuring settings specific to each connector. For information about configuring the properties and operations that are common to multiple connectors, see page 148. For information about configuring connector Services that are common to multiple connectors, see page 165.

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Copy

Copy enables users to perform a variety of copying functions using eCopy ShareScan Embedded software. When you activate the connector on a device running the embedded Client, the user does not need to quit the Client to make copies.

You can create Copy connector profiles on any PC running the Services Manager, and you can publish them to any Services Manager that supports the ShareScan Embedded software.

Copy is available for some, but not for all, embedded devices. If you try to activate a Copy profile on an unsupported device, the system will display an error message.

Note: You cannot use a Copy profile on a ScanStation.

To configure a Copy profile:

1. In the console tree, select **Copy** > **Properties**.
2. Select the **Display** tab and then specify the **Image** and **Label** settings (see page 149).
3. Click **Save**, select or specify the profile name, and then click **Save**.
4. In the console tree, select **Copy** > **Services**.

   Tracing is the only service available for Copy.
5. Select the **Tracing** tab and then specify the settings (see page 171).
6. Click **Save**, select the profile name, and then click **Save**.

eCopy Connector for Microsoft Exchange

The eCopy Connector for Microsoft Exchange enables a user to send scanned documents from an eCopy-enabled device as e-mail attachments from a generic Microsoft Exchange account or from the user's personal Microsoft Exchange account. eCopy recommends that you create a generic Microsoft Exchange account for use by ShareScan.

While ShareScan always uses the ShareScan User account information to log on to the Exchange server and to retrieve the Global Address List, it sends scanned documents from this account only if the Send from personal account option is not selected.

If the Send from personal account option is selected, the connector prompts the user to log on at the device. The Wizard selects the Send from personal account option automatically.

About Exchange Environment connection protocols

The eCopy Connector for Microsoft Exchange supports four combinations of connection protocols that can be used to connect to your Exchange server, depending on your environment. The Wizard automatically selects the protocol based on the Exchange environment information that you supply. For information about the available combinations of protocols and the environments in which they can be used, see Table 26.

TABLE 26. Exchange: Connection protocols

Protocol Combination	Microsoft Outlook Required?	Description
MAPI/MAPI	Yes[a]	Specifically designed for the Exchange 5.5 server only. Performs best if the computer running the Services Manager is a member of the forest where the Exchange server(s) reside.
LDAP/MAPI	Yes[a]	Best suited for intranet environments where the computer running the Services Manager is a member of the forest where the Exchange server(s) reside. Requires that the specified Service Account has access to a Global Catalog Server in the forest where the Services Manager is running. Requires Exchange Server 2000 or later.
LDAP/WEBDAV	No	Best suited for intranet environments where the computer running the Services Manager is not necessarily a member of the forest where the Exchange server(s) reside. Requires that the specified Service Account has access to a Global Catalog Server in the forest where the Services Manager is running. Requires Exchange server 2000 or later. If your operating system is Microsoft Windows 2000, you must install Microsoft ADO (ActiveX Data Objects) 2.8. for this protocol to work correctly.
WEBDAV/ WEBDAV	No	Best suited for Internet environments where the computer running the Services Manager is communicating with a front-end Exchange server on the Internet. For example, in small satellite offices employees can use Outlook Web Access (OWA) over the Internet to communicate with a front-end Exchange server located at a remote facility. Requires the front-end Exchange server to be version 2000 or later. If your operating system is Microsoft Windows 2000, you must install Microsoft ADO (ActiveX Data Objects) 2.8. for this protocol to work correctly.

a. You must install Microsoft Outlook on the same computer as the Services Manager so that the two applications can share common DLLs.

.

Note: When Microsoft Outlook is required, you must configure it as the default mail package. You must configure Microsoft Outlook 2000 to work with your Exchange server prior to using the ScanStation Client. eCopy also recommends that you configure Microsoft Outlook 2002, 2003, and 2007 to work with the Exchange server.

To configure eCopy Connector for Microsoft Exchange properties:

eCopy recommends that you use the Wizard to initially configure a connector profile.

1. In the console tree, select **Exchange** > **Properties**.
2. Select the **Display** tab and then specify the settings (see Table 14).
3. Select the **Configure** tab.

   The **Configure** tab displays a summary of the settings that you specify using the **Wizard** or using the **Properties** button.
4. Use the **Wizard** to specify the basic connector settings (see page 179).

   Note: Use the Properties button on the Configure tab only if you need to make custom modifications after the initial configuration.
5. If you are configuring a connector profile for an environment that uses an External Associated Account (EAA) and contains multiple forests, and you want to add additional account forests, see page 178.
6. Select the **Local Address Book** tab and then specify the settings (see Table 20 and see Table 21).

   Note: This tab allows you to create, configure, and enable an Internet address book. All the fields are documented in the referenced tables.
7. Select the **Content** tab and then specify the settings (see page 150).
8. Select the **Express** tab and then specify the settings (see page 152).
9. Click **Save,** select or specify the profile name, and then click **Save**.

To configure eCopy Connector for Microsoft Exchange services:

1. In the console tree, select **Exchange** > **Services**.

   The **Services** pane appears.

2. Configure the connector services (see page 165).
3. Click **Save**, select the profile name, and then click **Save**.

To add additional account forests:

This procedure applies only to environments that use an External Associated Account (EAA) and contain multiple forests.

1. After using the **Wizard** to configure your environment settings, select **Properties** on the **Configure** tab and then select the **Advanced Settings** tab.
2. Make sure that the current protocol matches the protocol for your environment.

   If you change the protocol, the system will prompt you to re-enter the user credentials on the **Basic Settings** tab (Table 28).

3. Select **Use External Associated Account**.

   The **Resource Forest Settings** window opens.

4. Enter the Global Catalog Server information (see Table 32) and then click **OK**.

   In the **Exchange Properties** pane, the **Additional Account Forests** section becomes active.

5. Click **New**.

   The **Account Forest Settings** window opens.

6. Enter the Account Forest and Service Account information for the new account forest.
7. Click **Test**.
8. When the test is successful, click **OK**.

   The new account forest is added to the list.

9. Click **OK** to return to the **Configure** tab.

Exchange Connectors Wizard Settings

The settings that you see in the Wizard depend on the information you enter about your Exchange environment. The information that you enter about your environment enables the Wizard to select the correct connection protocol. The settings that appear in the subsequent windows are a filtered subset of the settings in the Properties window. You will see only the settings that are appropriate for the environment that you select.

TABLE 27. Wizard settings: Exchange environment

Field Name	Description
Server type	Enables you to select the type of server that your company uses: ■ Exchange 2000 or later: Enables you to choose any of the Environment options. ■ Exchange 5.5: Makes the other selections in the window inactive. **Note:** If you are using Exchange 5.5, you must use Microsoft Outlook as your default mail package.
Environment	Enables you to select the type of environment that your company uses: ■ Single Forest ■ Multiple Forests: Use this option if you have users spread across multiple forests and are using EAA (External Associated Account) to associate users in the resource forest. ■ Hosted over the Internet: Use this option if you have an Internet environment where your users access the server using Outlook Web Access (OWA).
Connect using	Enables you to select the type of connection used by your environment: ■ Microsoft Outlook Libraries ■ HTTP/HTTPS

The Wizard prompts you to enter information based on your choice of environment settings. See the following tables for descriptions of the information required for each field:

- **Windows Server Account window:** see Table 28, Exchange Properties: Basic Settings tab.

  This window is available only if you select Exchange 5.5 as your server type.

- **Windows Active Directory Server Account window:** see Table 28, Exchange Properties: Basic Settings tab.

- **Exchange Server window:** see Table 29, Exchange Properties: Advanced Account Settings.

  This window is available only if you select HTTP/HTTPS as your connection protocol.

- **Resource Forest window:** see Table 32, Exchange Properties: Advanced Settings tab.

  This window is available only if you select Multiple Forests as your environment.

- **Fax Format window:** see Table 31, Exchange Properties: Fax Format Settings.

  This window is available only if you are configuring the eCopy Connector for Fax via Microsoft Exchange. It enables you to specify the format of the fax addresses used by your server.

Exchange Connectors Properties Settings

The Properties window enables administrators who are more familiar with Exchange server environments to fine-tune the settings without relying on the Wizard. eCopy recommends that you use the Wizard to initially configure a connector profile.

The Properties settings that are available depend on the connection protocols supported by your environment. Although the window opens to the Basic settings tab, you should verify that the correct connection protocols are displayed on the Advanced tab before specifying the settings on the other tabs. If you specify your settings and then change the protocol, the system prompts you to re-enter the user credentials on the Basic Settings tab.

TABLE 28. Exchange Properties: Basic Settings tab

Section	Field/Button Name	Description
ShareScan User[a]	User name	The user name for logging on to the Exchange server. The connector does not accept user names that contain spaces. Make sure that the user logon name specified in the Windows Active Server Directory or Exchange account does not contain spaces.
	Password	The Exchange account password.
	Domain	The Windows domain to which this user belongs (for Windows authentication).
	Exchange server	The name of the Exchange server.
	Advanced (Advanced Account Settings)	The advanced settings depend on the connection protocol selected for your Exchange environment (see page 175). For information about the different protocol combinations and the associated settings, see Table 29.
	Test	Validates the logon information.
Search	Search while typing	Enables or disables the Search while typing option at the device.

a. eCopy recommends that you create a generic Microsoft Exchange account for use by ShareScan.

The following table describes the advanced account settings for each combination of protocols. For information about the protocols, see Table 26.

TABLE 29. Exchange Properties: Advanced Account Settings

Protocol Combination (Advanced Settings tab)	**Field/Button Name**	**Description**
MAPI/MAPI Uses MAPI to retrieve the user information when the Search while typing option is enabled, and to send scanned documents.	Mailbox name different from the User name	Tells the connector to use the name specified in the Mailbox name field if the mailbox name is different from the user name for any reason.
	Mailbox name	The mailbox name that is used by the user account.
	E-mail ID	The e-mail ID of the user account.
LDAP/MAPI If the connector cannot find a Global Catalog Server, it prompts you to use the Advanced Account Settings window to configure the Global Catalog Server settings.	Locate server at runtime	Enables the user at the device to select a server.
	Always use the following server	The name of the Global Catalog Server to be used at the device.
	Port	The port that you want the server to use.
	Server requires SSL for communication	Select this option if the Global Catalog Server requires a Secure Socket Layer (SSL).
	Add Base DN	Defines a starting point for the Global Catalog Server search that takes place from the authentication window at the device. When you select a base DN (Distinguished Name), the Search while typing option searches the forest below the location of the Base DN. The browse button opens the Start Search At window, where you can select a Base DN in the Active Directory forest. Only users within the DN can authenticate, however, documents can be sent to any user in the forest. If this field is left blank, the search includes the entire forest.

TABLE 29. Exchange Properties: Advanced Account Settings (continued)

Protocol Combination (Advanced Settings tab)	**Field/Button Name**	**Description**
LDAP/WEBDAV Uses the same Global Catalog Server options as the ones available for the LDAP/MAPI combination, along with the following WEBDAV settings for the Exchange server.	Server requires SSL for communication	Select this option if the Exchange server requires a Secure Socket Layer (SSL).
	Use UPN format for User Credentials (user@example.com)	Enables you to pass user credentials to your ISP (Internet Service Provider) using the UPN (User Principal Name) format: UserName@DNSDomainName. The connector uses NETBIOSDOMAIN\Username unless this option is selected.
	Server uses forms-based authentication	Presents an Outlook Web Access (OWA), forms-based login screen to the user at the device.
	Server uses non-standard port	Specifies a non-standard port for all WEBDAV communication. **Note:** Do not select this option if you are using Exchange 2007 with LDAP/WEBDAV or WEBDAV/WEBDAV.
	Specify a front-end Exchange server	Sends All WEBDAV communication through the specified front-end Exchange server.
WEBDAV/WEBDAV Uses the same WEBDAV settings as the ones available for the LDAP/WEBDAV combination: ■ Server requires SSL for communication ■ Server uses forms-based authentication ■ Server uses non-standard port	Enter the domain names that the user can select at the device.	Enables the user at the device to select a domain from the domain names you enter in the Domains field.
	Username different from mailbox name	Select this option if Active Directory user names and mailbox names do not match. When you select this option, the Search while typing option will not be available on the Logon screen at the device; the connector will use the name that the user enters.

All the settings in this table apply to the eCopy Connector for Microsoft Exchange. Settings that also apply to the eCopy Connector for Fax via Microsoft Exchange are indicated in the table.

TABLE 30. Exchange Properties: General Settings tab

Section	Field Name	Description
Sender Settings (Available in the eCopy Connector for Fax via Microsoft Exchange.)	Send from personal account	Enables users to send e-mail from their personal Exchange account, rather than from the ShareScan User account (specified on the Basic Settings tab). Prompts the user at the device to log on to Exchange. The user can enter his or her personal logon information or, if authorized, another user's logon information. The connector sends each e-mail from the specified account.
	Add messages to Sent Items folder	Saves sent messages in the user's Sent Items folder.
Recipient Settings	Allow user to select recipients	Enables the user at the device to select recipients for the scanned documents.
	Allow user to add recipients to Cc list	Enables the user at the device to send a copy of a message to one or more recipients who are not the primary recipients.
	Send to self	Disables the list of recipients and sends the scanned documents only to the logged on user. You can use the $$FILENAME$$ variable on the Subject or Notes line to distinguish among scanned documents.

TABLE 30. Exchange Properties: General Settings tab (continued)

Section	Field Name	Description (continued)
Other General Settings	Search Global Address List	Enables the user at the device to search the Global Address List and select recipients from it.
	Search Outlook Contacts (Available in the eCopy Connector for Fax via Microsoft Exchange for LDAP/ WEBDAV and WEBDAV/WEBDAV protocols.)	Enables the user at the device to search the Outlook Contacts folder and select recipients from it. While Microsoft Outlook supports more than one Contacts folder per user, the connector searches for addresses only in the default Contacts folder. If a user needs access to addresses in a specific Contacts folder, the user must make that folder the default folder. Since this procedure is not the same for all Outlook clients, refer to your Outlook documentation for information about how to make a Contacts folder the default folder.
	Enable user to manually enter addresses when sending e-mail	Enables the user at the device to enter e-mail addresses that do not belong to any of the other address books or to the Contacts folder.
Message Options	Enables configuration message settings that are also available through Microsoft Outlook and OWA (Outlook Web Access): Importance, Sensitivity, Delivery Receipt, Read Receipt. Selecting the User Modify option for any of these settings displays an Options button on the Send screen at the device. The button opens a Message Options screen where the user can configure the available options for the scanned document.	

Fax Format settings are available only for the eCopy Connector for Fax via Microsoft Exchange.

TABLE 31. Exchange Properties: Fax Format Settings

Section	Field Name	Description
Fax Address Format	Cover Page / No Cover page	Displays the fax format that you define in the Fax Address Format window.
	Format	Opens the Fax Address Format window where you define the fax address format required by your fax server application or Internet fax service. Refer to the documentation for your fax application to obtain the correct format for the fax address. Since fax application vendors change these formatting schemes frequently, make certain you obtain the current format.
Valid characters in Fax number		Enables you to define the characters allowed by your fax application or service as part of a fax address.

TABLE 32. Exchange Properties: Advanced Settings tab

Section	Field Name	Description
Use External Associated Account Available only if the LDAP/MAPI or LDAP/WEBDAV combination is selected. Enables you to connect between a resource forest and one or more account forests[a].	Resource Forest	Opens the Resource Forest Settings window where you specify information about a Global Catalog Server in the resource domain: ■ Locate Global Catalog Server at runtime: Selects a server in the specified domain at runtime. ■ Always use the following server in the Resource Forest: Specifies the name of the Global Catalog Server to be used at the device. ■ Base DN: Defines a starting point for the Global Catalog Server search from the authentication window at the device. When you select a base DN (Distinguished Name), the Search while typing option searches the forest below the location of the Base DN. The connector uses the credentials specified on the Basic Settings tab to log on to the specified Global Catalog Server.
Additional Account Forests	List table	Enables you to add account forests to the list if you have more than one forest or edit settings for existing account forests. If there is a two-way trust between the account forest and the resource forest, and the user account specified on the Basic Settings tab is an enabled user in the resource forest, you do not need to specify additional service accounts for additional account forests. The Account Forest Settings window enables you to specify information about the Account Forest and the Service Account: ■ Locate Global Catalog Server at runtime: Selects a server in the specified domain at runtime. ■ Always use the following Global Catalog Server: Specifies the name of the Global Catalog Server to be used at the device. ■ Use Account information specified on the Basic Settings tab or Specify Account settings (see Table 28): Specifies the Service Account for the account forest.
Connection Protocol	Current Protocol	The connection protocol used by your environment (see Table 26). The default is LDAP/MAPI. If you change the protocol, the system will prompt you to re-enter the user credentials on the Basic Settings tab. The only settings that are preserved when you change protocols are the user name, password, domain, and Exchange server.

[a.] An Exchange Resource Forest runs Exchange and hosts mailboxes. An Account Forest holds active users and groups. EAA is useful if you want to manage multiple account forests from a central location.

eCopy Connector for Microsoft Exchange Local Address Book Settings

This Local Address Book tab enables you to configure the local address books that store Internet e-mail addresses entered at the device, addresses that are not in the Global Address List or in the Contacts folder. For information about creating and configuring address books, see page 160.

When you select the Enable user to manually enter addresses when sending e-mail option on the General Settings tab and you enable the Internet Address Book option on the Local Address Book tab, the system automatically adds the addresses entered by a user at the device to the local address book.

eCopy Connector for Fax via Microsoft Exchange

The eCopy Connector for Fax via Microsoft Exchange enables users to scan and fax documents from an eCopy-enabled device through an e-mail-to-fax gateway on the Microsoft Exchange server. To use this connector, you must have a network fax server and the appropriate Exchange server plug-in.

The recipient's fax number is included in the To field (on the ShareScan Client) in the format required by the fax server. The server plug-in recognizes the recipient address as a fax number and hands the request off to the network fax server for delivery as a fax.

While ShareScan always uses the ShareScan User account information to log on to the Exchange server and retrieve the Global Address List, it sends scanned documents from this account only if the Send from personal account option is not selected.

If the Send from personal account option is selected, the connector prompts the user to log on at the device. The Wizard selects the Send from personal account option automatically.

Note: The eCopy Connector for Fax via Microsoft Exchange and the eCopy Connector for Microsoft Exchange have many common functions and settings. Where common information exists, cross-references in this section are to the relevant section of the eCopy Connector for Microsoft Exchange documentation.

About Exchange Environment connection protocols

The eCopy Connector for Fax via Microsoft Exchange supports four combinations of connection protocols that can be used to connect to your Exchange server, depending on your environment. The Wizard automatically selects the protocol based on the Exchange environment information that you supply. for more information about the available combinations of protocols and the environments in which they can be used, see Table 26.

To configure eCopy Connector for Fax via Microsoft Exchange properties:

eCopy recommends that you use the Wizard to initially configure a connector profile. Use the Properties button on the Configure tab only if you need to make custom modifications after the initial configuration.

1. In the console tree, select **Fax via Exchange** > **Properties**.
2. Select the **Display** tab and then specify the settings (see Table 14).
3. Select the **Configure** tab.

   The **Configure** tab displays a summary of the settings that you specify using the **Wizard** or the **Properties** window (see page 179).
4. Use the connector **Wizard** to specify the basic settings (see Table 27).

   This includes specifying the **Fax Format** tab (see page 158).
5. If you are configuring a connector profile for an environment that uses an External Associated Account (EAA) and contains multiple forests, and you want to add additional forests (see page 178).
6. Select the **Local Address Book** tab and then specify the settings (see Table 20 and see Table 21).
7. Select the **Content** tab and then specify the settings (see Table 15).
8. Select the **Express** tab and then specify the settings (see Table 16).
9. Click **Save**, select or specify the profile name, and then click **Save**.

To configure eCopy Connector for Fax via Microsoft Exchange services:

1. In the console tree, select **Fax via Exchange** > **Services**.

   The **Services** pane appears.
2. Configure the connector services (see page 165).
3. Click **Save**, select the profile name, and then click **Save**.

eCopy Connector for Lotus Notes Mail

The eCopy Connector for Lotus Notes Mail enables users to send scanned documents from an eCopy-enabled device as e-mail attachments from a generic Lotus Notes account or from the user's personal Lotus Notes account. eCopy recommends that you create a generic Lotus Notes account for use by ShareScan.

Before e-mail can be sent from a personal Lotus Notes account, you configure the eCopyMail pass-through database on a Domino HTTP server. Refer to the technical documentation in the following directory for further information and setup instructions:

```
c:\Program
Files\eCopy\ShareScanOP\ShareScanOPManager\Connectors\LNotesMail\PassThruDB
```

The connector provides access to the Lotus Notes address book as well as to the local Internet address book. When a user sends e-mail from a personal Lotus Notes account, a copy of the message is automatically delivered to the sender's Inbox folder.

Important! You must install the Lotus Notes client before you can install the Lotus Notes e-mail or fax connector. The Lotus Notes e-mail and fax connectors will not be available for installation unless the Lotus Notes client is installed on the computer running the Services Manager.
If the Lotus Notes client installation program prompts you to choose between the Multi-User Install option and the Single User Install option, make sure that you select the Single User Intall option.

ShareScan typically uses the login name specified in the Active ID file to access the Global Address List, while sending messages from the user's personal Lotus Notes account.

To configure eCopy Connector for Lotus Notes Mail properties:

1. In the console tree, select **Lotus Notes Mail** > **Properties**.
2. Select the **Display** tab and then specify the settings (see Table 14).
3. Select the **Configure** tab and then specify the settings (see Table 33).
4. Select the **Address Books** tab and then specify the settings (see Table 20 and see Table 21).

   Note: This tab allows you to configure and enable the Lotus Notes Address Book and create, configure, and enable an Internet address book. All the fields are documented in the referenced tables.

5. Select the **Content** tab and then specify the settings (see Table 15).
6. Select the **Express** tab and then specify the settings (see Table 16).
7. Click **Save**, select or specify the profile name, and then click **Save**.

TABLE 33. Lotus Notes Mail Properties: Configure tab

Section	Field/Button	Description
ShareScan User The account used to access the Global Address List.	Active ID File	The name of the Lotus Notes ID file installed on the local computer.
	User Name	The user name associated with the Active ID file.
	Password	The password associated with the Active ID file.
	Test	Validates the logon information.
Email Send Options	Send from personal account	Sends e-mail from a personal Lotus Notes account, rather than from the ShareScan User account. This option is available only if the Lotus Notes Address Book option is enabled (on the Address Books tab). If you select this option, you must configure a Domino HTTP/HTTPS server to use the eCopyMail pass-through database and specify the Domino Server, Mail Send Port, and encryption options.
	Domino Server	The name of the HTTP/HTTPS server where the eCopyMail pass-through database is installed: ■ For HTTP: Enter the server name, IP address, or fully qualified domain name, as appropriate, for your Domino environment. ■ For SSL/HTTPS: Enter the server name exactly as it appears in the SSL certificate. For example, if the name is "lsphere.ecopydocs.com", enter this text in the field.
	Mail Send Port	The port number used to send mail (defaults are 80 for HTTP; 443 for SSL/HTTP).
	Use SSL/HTTPS	Encrypts communication with the server using SSL/HTTPS
Send to self		Disables the list of recipients and sends the scanned documents only to the logged on user. You can use the $$FILENAME$$ name variable on the Subject or Notes line to distinguish among scanned documents.
Enable user to Cc recipients when sending mail		Enables the user at the device to send a copy of a message to one or more recipients who are not the primary recipients.

To configure eCopy Connector for Lotus Notes Mail services:

1. In the console tree, select **Lotus Notes Mail** > **Services**.
   The **Services** pane appears.
2. Configure the connector services (see page 165).
3. Click **Save**, select the profile name, and then click **Save**.

eCopy Connector for Fax via Lotus Notes

The eCopy Connector for Fax via Lotus Notes enables users to scan and fax documents from an eCopy-enabled device through an e-mail-to-fax gateway on the Lotus Notes server. To use this connector, you must have a network fax server and the appropriate Lotus Notes server plug-in.

The scanned document, along with sender and recipient information, is sent to the Lotus Notes server using the local Lotus Notes client.

Before faxes can be sent from a personal Lotus Notes account, you must configure the eCopyMail pass-through database on a Domino HTTP server. Refer to the technical documentation in the following directory for further information and setup instructions:

```
c:\Program
Files\eCopy\ShareScanOP\ShareScanOPManager\Connectors\LNotesMail\PassThruDB
```

The connector provides access to the Lotus Notes address book as well as to the local Internet address book. When a user sends e-mail from a personal Lotus Notes account, a copy of the message is automatically delivered to the sender's Inbox folder.

Important! You must install the Lotus Notes client before you can install the Lotus Notes e-mail or fax connector. The Lotus Notes e-mail and fax connectors will not be available for installation unless the Lotus Notes client is installed on the computer running the Services Manager.
If the Lotus Notes client installation program prompts you to choose between the Multi-User Install option and the Single User Install option, make sure that you select the Single User Intall option.

The recipient's fax number is included in the To field (on the ShareScan Client) in the format required by the fax server. The server plug-in recognizes the recipient address as a fax number and hands the request off to the network fax server for delivery as a fax.

ShareScan typically uses the login name specified in the Active ID file to access the Global Address List, while sending messages from the user's personal Lotus Notes Mail account.

To configure the eCopy Connector for Fax via Lotus Notes properties:

1. In the console tree, select **Fax via Lotus Notes** > **Properties**.
2. Select the **Display** tab and then specify the settings (see Table 14).
3. Select the **Configure** tab and then specify the settings(see Table 34).
4. Select the **Fax Format** tab, which displays samples of the current fax address format, and then specify the Fax format (see page 158).

   If your fax server uses an embedded tag, enter the tag in the **Cover Page Via Embedded Tag** field. (Some fax servers, including Captaris™ RightFax™, use an embedded tag to indicate that a cover page is required.) When a user requests a cover page, ShareScan adds the embedded tag string to the body of the message.
5. Select the **Address Books** tab and then specify the settings (see Table 20 and see Table 21).

   Note: This tab allows you to configure and enable the Lotus Notes Address Book and create, configure, and enable a fax address book. All the fields are documented in the referenced tables.
6. Select the **Content** tab and then specify the settings (see Table 15).
7. Select the **Express** tab and then specify the settings (see Table 16).
8. Click **Save**, select or specify the profile name, and then click **Save**.

TABLE 34. Fax via Lotus Notes Properties: Configure tab

Section	Field/Button Name	Description
ShareScan User[a] The account used to access the Global Address List.	Active ID File	The name of the Lotus Notes ID file installed on the local computer.
	User Name	The user name associated with the Active ID file.
	Password	The password associated with the Active ID file.
	Test	Validates the logon information.
Email Send Options	Send from personal account	Sends e-mail from a personal Lotus Notes account, rather than from the ShareScan User account. This option is available only if the Lotus Notes Address Book option is enabled (on the Address Books tab). If you select this option, you must configure a Domino HTTP/HTTPS server to use the eCopyMail pass-through database and specify the Domino Server, Mail Send Port, and encryption options.
	Domino Server	The name of the HTTP/HTTPS server where the eCopyMail pass-through database is installed: ■ For HTTP: Enter the server name, IP address, or fully qualified domain name, as appropriate, for your Domino environment. ■ For SSL/HTTPS: Enter the server name exactly as it appears in the SSL certificate. For example, if the name is "lsphere.ecopydocs.com", enter this text in the field.
	Mail Send Port	The port number used to send mail (defaults are 80 for HTTP; 443 for SSL/HTTP).
	Use SSL/HTTPS	Encrypts communication with the HTTP server using SSL/HTTPS.

a. eCopy recommends that you create a generic Lotus Notes account for use by ShareScan.

To configure eCopy Connector for Fax via Lotus Notes services:

1 In the console tree, select **Fax via Lotus Notes** > **Services**.

The **Services** pane appears.

2 Configure the connector services (see page 165).

3 Click **Save**, select the profile name, and then click **Save**.

eCopy Connector for SMTP using LDAP

The eCopy Connector for SMTP using LDAP enables users to send scanned documents from an eCopy-enabled device as e-mail attachments using an SMTP server on the network. When a user sends e-mail from a personal SMTP account, the system prompts users to log on to validate their identity. The Global Address List is provided by an LDAP server.

eCopy recommends that you use the Wizard to initially configure a connector profile.

To configure the eCopy Connector for SMTP using LDAP properties:

1. In the console tree, select **LDAP/SMTP** > **Properties**.
2. Select the **Display** tab and then specify the settings (see Table 14).
3. Select the **Configure** tab.

   The **Configure** tab displays a summary of the settings that you specify using the **Wizard** or using the **Properties** window.

   Use the **Wizard** to specify the basic connector settings (see Table 35).

   Note: Use the Properties button on the Configure tab only if you need to make custom modifications after the initial configuration.

4. Select the **Local Address Books** tab and then specify the settings (see Table 20 and see Table 21).

   Note: This tab allows you to reate, configure, and enable an Internet address book. All the fields are documented in the referenced tables.

5. Select the **Content** tab and then specify the settings (see Table 15).
6. Select the **Express** tab and then specify the settings (see Table 16).
7. Click **Save**, select or specify the profile name, and then click **Save**.

To configure the eCopy Connector for SMTP using LDAP services:

1 In the console tree, select **LDAP/SMTP** > **Services**.

The **Services** pane appears.

2 Configure the connector services (see page 165).

3 Click **Save**, select the profile name, and then click **Save**.

SMTP using LDAP connector Wizard settings

The Wizard enables administrators to initially configure the connector. Many windows contain a Test button that enables you to validate the logon information or test the server connection.

TABLE 35. Wizard settings: SMTP using LDAP

Wizard Window	Field	Description
LDAP Server Type	Server Type	The available server types: ■ Generic LDAP Server ■ Windows Active Directory ■ Windows Active Directory (Untrusted) ■ Novell eDirectory ■ Netscape LDAP Server ■ Open LDAP Server ■ IBM Domino Server Your selection enables the Wizard to set your user ID, e-mail address, first name, last name, and common name. If your server type is not on the list, select the Generic LDAP Server option.
Windows Active Directory Server Account Available only if you select Active Directory as the server type.	Account Settings	Active Directory Server Account settings: ■ User name ■ Password ■ Domain The Wizard uses this information to set the user DN and server name.

TABLE 35. Wizard settings: SMTP using LDAP (continued)

Wizard Window	Field	Description
LDAP Server Settings Not available if you select Active Directory as the server type.	LDAP Server Settings	LDAP server settings: ■ Server ■ Port ■ User DN ■ Password You must provide the full user DN if the server requires it. The Wizard assumes that the server is using the default port number (389). The Wizard resets the port back to 389 if it was changed in the Properties window.
	Connect Anonymously	Bypasses the Select LDAP User window and allows anonymous connection to the LDAP server, if the server supports anonymous authentication.
Select LDAP User Not available if you select Active Directory as the server type.		Enables you to select a user from the LDAP tree in the Select LDAP User window.

TABLE 35. Wizard settings: SMTP using LDAP (continued)

Wizard Window	Field	Description
Search Settings	Start Search At	The node on the LDAP tree from which all searches should begin. If you do not know the node, click the Browse button and then select the node from the tree structure in the selection window.
	Search scope	Select a search level: ■ All levels below search starting point: Allows expanded searching. ■ One level below search starting point: Optimizes LDAP queries and improves performance.
	Sender Search	The search criterion that the server uses to find the sender: ■ First Name ■ Last Name ■ Common Name ■ User ID The setting defines the information that the user sees on the Logon screen at the device.
	Recipient Search (for Mail via SMTP using LDAP only)	The search criterion that the server uses to find the recipient: ■ Common Name ■ First Name ■ Last Name ■ User ID The setting defines the information that the user sees on the Send screen at the device. **Tip:** If you are using an Active Directory server and want the list of recipients to display groups as well as individuals, eCopy recommends that you retain the default setting, Common Name. If you select any other search criterion, users who want to send documents to a group must enter the complete e-mail address of the group at the device.
	Search while typing	Enables or disables the Search while typing option at the device (see page 155)
SMTP Settings	Server	The SMTP server name.
	Port	The SMTP port number.

TABLE 35. Wizard settings: SMTP using LDAP (continued)

Wizard Window	Field	Description
User Logon Settings	None	Sends the user at the device directly to the Send screen without displaying the Logon screen. If you select this option, you must specify a generic e-mail address or select the User modify option, or select both.
	Generic e-mail	A generic e-mail address that is used as the sender account for all e-mail.
	User modify	The user at the device can modify the sender's e-mail address.
	LDAP	Requires the user at the device to enter the user name and password specified for the LDAP server.
	Windows domain	Enables users at the device to use their Windows logon information, via the SAMAccountName attribute, to log on. The Domain field specifies the Windows domain name, populated from the Account Settings window. This is required if you select the Windows option. Available only if you select Active Directory as the server type.
	Novell tree	The Novell tree. This is required if you select the Novell option. Available only if you select eDirectory as the server type.
Fax Address Format (For Fax via SMTP using LDAP only.)	Cover Page / No Cover Page	Displays the fax format that you define in the Fax Address Format window.
	Format	Opens the Fax Address Format window where you define the fax address format required by your fax server application or Internet fax service (see page 158). Refer to the documentation for your fax application to obtain the correct format for the fax address. Since fax application vendors change these formatting schemes frequently, make certain you obtain the current format.
Settings Summary		Enables you to review your settings. Use the Back button if you need to change any settings. Use the Finish button to apply your settings to the connector profile.

eCopy Connector for SMTP using LDAP Properties

The Properties window enables administrators who are more familiar with LDAP to fine-tune the settings, without relying on the Wizard. Many windows contain a Test button that you use to validate the logon information or test the server connection.

TABLE 36. LDAP/SMTP Properties: Basic LDAP tab

Section	Field	Description
LDAP Server The server that will provide the Global Address List; the same server is used for sender authentication if LDAP authentication is enabled.	Server	The IP address, DNS name, or URL of the LDAP server associated with the directory you want to use.
	Port	The LDAP port number. The default is 389. If this does not work, try 3268.
	Server requires SSL for communication	Requires the client to use SSL to communicate with the server.
	User DN	The distinguished name (DN) of the server account. The account must have the appropriate permissions to query the supplied base DN and extract attributes from the query results.
	Password	The password associated with the server account.
	Connect Anonymously	Allows anonymous connection to the LDAP server, if the server supports anonymous authentication.

TABLE 36. LDAP/SMTP Properties: Basic LDAP tab (continued)

Section	Field	Description
Search	Base DN	The DN of the base or root of the directory in which to search. This varies depending on the server you are using and the portion of the directory you wish to search. Examples of potential base DNs are: ■ "DC=ecopy" ■ "CN=users" ■ "DC=ecopy "DC=com" ■ "OU=marketing,DC=ecopy" If you leave this field blank, the connector uses "DC=" and tries to obtain the directory root from the LDAP server automatically.
	Search scope	Select a search level: ■ All levels below search starting point: Allows expanded searching. ■ One level below search starting point: Optimizes LDAP queries and improves performance.
	Sender Search	The search criterion that the server uses to find the sender: ■ First Name ■ Last Name ■ Common Name ■ User ID The setting defines the information that the user sees on the Logon screen at the device.
	Recipient Search (for Mail via SMTP using LDAP only)	The search criterion that the server uses to find the recipient: ■ Common Name ■ First Name ■ Last Name ■ User ID The setting defines the information that the user sees on the Send screen at the device. **Tip:** If you are using an Active Directory server and want the list of recipients to display groups as well as individuals, eCopy recommends that you retain the default setting, Common Name. If you select any other search criterion, users who want to send documents to a group must enter the complete e-mail address of the group at the device.
	Search while typing	Enables or disables the Search while typing option at the device (see page 155).

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TABLE 37. LDAP/SMTP Properties: Advanced LDAP tab[a]

Section	Field	Description
LDAP Attributes If you use a non-standard attribute in the e-mail, First Name, Last Name, and Common Name fields, enter the attribute name in the field.	Class	The LDAP class to which the attributes you want to query belong: ■ DominoPerson ■ Person ■ User
	User ID	The attribute that your system uses to query the user ID: ■ SAMAccountName ■ uid
	e-mail	The attribute that your system uses to query the mail id: ■ mail ■ e-mail
	First name	The attribute that your system uses to query the user's first name: ■ givenName ■ sn ■ uid ■ SAMAccountName
	Last name	The attribute that your system uses to query the user's last name: ■ sn ■ givenName ■ uid ■ SAMAccountName
	Common name	The attribute that your system uses to query the user's common name: ■ uid ■ SAMAccountName ■ sn ■ cn ■ givenName

Custom LDAP Attributes		Control the display of sender and recipient information at the device. Use square brackets to define custom attributes and static text to enter elements that remain constant, as in the following example that displays the sender or recipient's title and their company (eCopy):
		`[title] – eCopy`
		`John Smith (Software Engineer – eCopy)`
		"title" is an LDAP attribute that belongs to the Person class.

[a] This tab enables you to customize your queries to the LDAP database and choose the LDAP attributes to query

TABLE 38. LDAP/SMTP Properties: SMTP Settings tab

Section	Field/Button	Description
SMTP Server	Server	The IP address or DNS name of the SMTP server to use for outgoing messages. If the server supports anonymous access, it must be disabled if you want to use SMTP authentication.
	Port	The SMTP port number (default is 25).
Mail Account (For Mail via SMTP using LDAP only.)	Allow user to select recipients	Enables the user at the device to select recipients for the scanned documents: ■ Allow user to add recipients to Cc list: Enables the user at the device to send a copy of a message to one or more recipients who are not the primary recipients. ■ Send copy to Sender: Automatically delivers a copy of the message to the person specified in the From field.
	Send to self	Disables the list of recipients and sends the scanned documents only to the logged on user.
SMTP Server Logon Available only if SMTP Basic Authentication is enabled on the server. **Note:** If Session Logon is enabled, and SSL is not enabled, eCopy recommends that you select "None" or "Login As".	None	Use if the SMTP server does not require authentication.
	Use Sender's User ID, LDAP Attribute, and runtime password	Uses the sender's LDAP authentication information to connect to the SMTP server.
	Login As	Enables the user at the device to connect to the SMTP server without being prompted for authentication information. The connector uses the specified user name and password.
	Runtime: Prompt Sender for a user name and password	Prompts the user at the device to enter a user name and password when the user presses the Send button on the Send screen.

TABLE 39. LDAP/SMTP Properties: User Logon tab

Section	Field	Description
Logon	Send from a generic account	Sends the user at the device directly to the Send screen without displaying the Logon screen. If you select this option you must specify a generic e-mail address or select the User modify option, or select both. If you do not want to use the LDAP Address Book, you must select this option.
	Generic e-mail	A generic e-mail address that is used as the sender account for all e-mail.
	User modify	The user at the device can modify the sender's e-mail address.
	LDAP	Requires the user at the device to enter the user name and password specified for the LDAP server.
	Windows domain	Enables users at the device to use their Windows logon information, via the SAMAccountName attribute, to log on. The Domain field specifies the Windows domain name. This is required if you select the Windows option. Available only if you select Active Directory as the server type.
	Novell	The Novell tree. This is required if you select the Novell option. Available only if you select eDirectory as the server type.

Fax Format settings are available for the eCopy connector for Fax via SMTP only.

TABLE 40. LDAP/SMTP Properties: Fax Format Settings

Section	Field Name	Description
Fax Address Format	Cover Page / No Cover page	Displays the fax format that you define in the Fax Address Format window.
	Format	Opens the Fax Address Format window where you define the fax address format required by your fax server application or Internet fax service. Refer to the documentation for your fax application to obtain the correct format for the fax address. Since fax application vendors change these formatting schemes frequently, make certain you obtain the current format.

eCopy Connector for Fax via SMTP

The eCopy Connector for Fax via SMTP enables users to scan and fax documents from an eCopy-enabled device through an SMTP e-mail-to-fax gateway. To use this connector, you must have a network fax server and the appropriate SMTP server plug-in.

The scanned document along with the sender and recipient information is sent to the SMTP server as a MIME-formatted mail message.

The recipient's fax number is included in the To field (on the ShareScan Client) in the format required by the fax server. The server plug-in recognizes the recipient address as a fax number and hands the request off to the network fax server for delivery as a fax.

To configure eCopy Connector for Fax via SMTP properties:

1. In the console tree, select **Fax via SMTP** > **Properties**.
2. Select the **Display** tab and then specify the settings (see Table 14).
3. Select the **Configure** tab

   The **Configure** tab displays a summary of the settings that you specify using the **Wizard** or the **Properties** window.
4. The **Enable LDAP Address Book** option is selected by default. To disable this option you must select **Send from a generic account** as your **User Logon** setting (see Table 39).
5. Use the connector **Wizard** to specify the basic settings (see Table 35).

   This includes specifying the Fax format (see Table 40).

   Use the **Properties** button on the **Configure** tab only if you need to make custom modifications after the initial configuration. (see page 201).
6. Select the **Local Address Book** tab and then specify the settings (see Table 20 and see Table 21).
7. Select the **Content** tab and then specify the settings (see Table 15).
8. Select the **Express** tab and then specify the settings (see Table 16).
9. Click **Save**, select or specify the profile name, and then click **Save**.

.

Note: The eCopy Connector for Fax via SMTP and the eCopy Connector for SMTP using LDAP have many common functions and settings. Where common information exists, cross-references in this section are to the relevant section of the eCopy Connector for SMTP using LDAP documentation.

To configure eCopy Connector for Fax via SMTP services:

1. In the console tree, select **Fax via SMTP** > **Services**.
   The **Services** pane appears.
2. Configure the connector services (see page 165).
3. Click **Save**, select the profile name, and then click **Save**.

eCopy Connector for Captaris™ RightFax™

The eCopy Connector for Captaris™ RightFax™ enables users to scan and fax documents from an eCopy-enabled device through an existing RightFax server. The connector is compatible with RightFax Server 9.0 with Service Pack 2 and 9.3.

When configured appropriately, users can send files from their personal RightFax account and access their personal RightFax phone book for recipient selection. Delegation, cover pages, and billing codes are also supported when configured on the RightFax server.

When you install the connector, the required RightFax API files are automatically installed on the PC where the Services Manager is installed.

Important! The RightFax client software must not be installed on the system where the ShareScan Services Manager is installed.

Setup for Windows NT authentication

To use Windows NT authentication with a RightFax connector profile, perform the following steps:

- Link all RightFax user accounts that will use the connector profile to a Windows NT domain user ID. To do this, you run the RightFax Enterprise Fax Manager application, double-click a user account, select the Identification tab, and then select the Use Integrated Windows NT Security check box.
- Grant “Log on Locally” permission to the RightFax users.
- Make sure that the RightFax server and the system running the Services Manager are in the same domain.
- On a Windows 2000 system, grant the user running the Administration console “Act as part of the operating system (SE_TCB_NAME)" privileges”.

To configure eCopy Connector for Captaris™ RightFax™ properties:

1. In the console tree, select **RightFax** > **Properties**.
2. Select the **Display** tab and then specify the settings (see Table 14).
3. Select the **Configure** tab and then specify the settings (see Table 41).
4. Save the connector profile before proceeding to the **Billing Codes** tab.
   Saving the profile enables the connector to populate the billing code fields correctly.
5. Select the **Billing Codes** tab and then specify the settings (see Table 42).
6. Select the **Content** tab and then specify the settings (see Table 15).
7. Select the **Express** tab and then specify the settings (see Table 16).
8. Click **Save**, select or specify the profile name, and then click **Save**.

TABLE 41. RightFax Properties: Configure tab

Section	Field/Button	Description
RightFax Server	Server	The name of your RightFax server.
	User	The name of the user account with which to log on to the RightFax server and retrieve the user list. If you plan to use Windows NT authentication, enter the user name for a Windows NT domain account.
	Password	The account password.
	Test	Validates the connection to the RightFax server.
	Send from personal account	Sends the fax from the logged on user's personal RightFax account (or from a delegate account). If you do not select this option, the connector sends faxes from the user account specified in the User field.
	Use Windows NT authentication	Available only for RightFax Server 8.7 and later. If selected, all users must log on to the RightFax server using their Windows NT credentials (for setup information, see page 208.)
	Use delegation	Enables users with Admin access rights to send faxes on behalf of other users. Specific delegation rights must be set up on the RightFax server.

TABLE 41. RightFax Properties: Configure tab (continued)

Section	Field/Button	Description
Phone Books	Enable	Enables the user's personal RightFax phone book to be available for recipient selection.
	Add new recipients	Enables users to add new recipients to their personal phone book using the Save Recipient option on the Send > Details screen at the device.
	Limit to phone book recipients	Enables users to send faxes only to recipients already in the phone book.
Cover Sheet Default	Yes/No	Specifies the default setting for cover sheets. **Important!** A cover sheet can only be sent with a fax if the Use Cover Sheet option is enabled in the RightFax FaxUtil client for the authenticated user (see your RightFax documentation).
	Hide buttons	If you select this option, the connector profile hides the cover sheet buttons from the user and uses your selected default setting (Yes or No) to determine whether to attach a cover sheet. In all cases, if the authenticated user's RightFax account has not been configured to send cover sheets, an error message appears when the user presses the Send button.

TABLE 42. RightFax Properties: Billing Codes tab

Section	Field/Button	Description
Billing Codes	Fields 1, 2, and 3	Displays the available billing codes that are defined on the RightFax server. You can enable the fields for use with scanned documents. Each enabled field appears on the Billing Codes screen at the device. (If you do not enable any fields, the Billing Codes screen does not appear.) For each field, select the appropriate options. The title of Field 3 is always "Description".
	Enable	Prompts the user to select or enter a billing code. If the field is defined as required on the RightFax server, it appears with an asterisk (*) on the Billing Codes screen and the user must enter a value in the field. You must enable the first field in order to enable the second field, and the second field to enable the third field.
	Verify	Validates the information entered by the user at the device against the list of billing codes defined on the RightFax server. You must enable verification for the first field in order to enable verification for the second field. There is no Verify option for the third field (the description field).
Cost Recovery	Read billing codes from Cost Recovery	If your company uses the Cost Recovery Service, you can choose to obtain the billing codes directly from the service through eCopy Data Publishing. When the Read billing codes from Cost Recovery option is selected, the Verify option is disabled for all billing codes. For more information on Cost Recovery, see the *eCopy Cost Recovery Service Administrator's Guide*.
	Billing codes form display options	Enables you to control the display of the Billing Codes form at the device: ■ Hide Billing Codes form: The form does not appear at the device. ■ Show Billing Codes form: The form at the device displays the fields that you enable on the Billing Codes tab. Users can modify the contents of the fields. ■ Show Billing Codes form read-only: The form at the device displays the fields that you enable on the Billing Codes tab. Users cannot modify the contents of the fields.

To configure eCopy Connector for Captaris™ RightFax™ services:

1. In the console tree, select **RightFax** > **Services**.
2. Configure the connector services (see page 165).
3. Click **Save**, select the profile name, and then click **Save**.

Notes: If you use Express with a RightFax connector profile, you must save the connector profile, with the RightFax server information, before you test your Express configuration.
If you select the Send from personal account option on the Configure tab and then configure the connector profile to use Express, the connector will prompt the user at the device to enter authentication information.

eCopy Connector for Fax via Print

The eCopy Connector for Fax via Print enables users to scan and fax documents from an eCopy-enabled device through a third-party fax driver. The fax driver displays its own user interface, if any, on the ScanStation. Some fax drivers display an e-mail client.

Note: You can create Fax via Print profiles on any Services Manager and publish them to any Services Manager that supports the ShareScan Embedded software. However, you cannot run Fax via Print on a device running the ShareScan Embedded software.

You must configure the ScanStation Client to use the hard keyboard. This is because the soft keyboard does not support third-party fax driver interfaces.

Before configuring a Fax via Print connector profile, install the fax driver on the ScanStation, or, if supported by the driver, on a network print server.

To configure eCopy Connector for Fax via Print properties:

1. In the console tree, select **Fax via Print** > **Properties**.
2. Select the **Display** tab and then specify the settings (see Table 14).
3. Select the **Configure** tab and then specify the settings (see Table 43).
4. Click **Save**, select or specify the profile name, and then click **Save**.

TABLE 43. Fax via Print Properties: Configure tab

Field	Description
Print Driver	The available print drivers.
Authentication	Specifies the type of user authentication at the device: ■ None: The connector will not prompt the user for logon information. ■ Novell NetWare: The default Novell tree. ■ Windows: The default Windows domain. Users at the device can change the Novell tree or Windows domain when they enter their logon information.

To configure eCopy Connector for Fax via Print services:

1. In the console tree, select **Fax via Print** > **Services**.
   The **Services** window appears.
2. Configure the connector services (see page 165).
3. Click **Save**, select the profile name, and then click **Save**.

Quick Connect

Quick Connect enables users to scan documents and deliver them to predetermined network locations, Web locations, databases, or to an SMTP server, with minimal data entry requirements. It is ideally suited to environments where large numbers of documents must be scanned quickly into automated or manual workflows. For example, a human resources department might use Quick Connect to scan incoming job applications and deliver them to a central repository for review.

Note: Quick Connect supports Oracle® Database 10*g*. When you install Oracle Client 10*g*, select the Custom Installation option and then make sure that you select the Oracle Provider for OLE DB component. This enables Quick Connect to connect to the Oracle database and store scanned documents and other information.

You can configure the connector so that users only have to press a few keys and do not have to enter any data. To accomplish this, you perform the following tasks:

- Configure the connector to use a single destination (with subfolder navigation disabled).
- Define a default file name that the user cannot modify.
- Create an index file with index fields that the user cannot modify.
- Specify "no authentication" or pre-define the logon information.

When a user presses an appropriately configured Quick Connect button and then presses the Next button, Quick Connect scans the document and delivers it to the pre-defined destination without further user intervention.

To configure Quick Connect properties:

1. In the console tree, select **Quick Connect** > **Properties**.
2. Select the **Display** tab and then specify the settings (see Table 14).
3. Select the **Destinations** tab and then define a scanning destination (see page 217).
4. Select the **File Name** tab and then define any file naming fields (see page 221).
5. Select the **Index File** tab and then define any index fields (see page 222).
6. Click **Save**, select or specify the profile name, and then click **Save**.

To configure Quick Connect services:

1. In the console tree, select **Quick Connect** > **Services**.
   The **Services** pane appears.
2. Configure the connector services (see page 165).
3. Click **Save**, select the profile name, and then click **Save**.

Defining a scanning destination

The Destinations tab enables you to define scanning destinations. You must define at least one destination. If you define more than one destination, Quick Connect will prompt the user to select one during the scanning process.

To define a destination:

1. Select **Quick Connect** > **Properties**.
2. Select the **Destinations** tab and then click **New**.

   The **New destination** window opens.
3. In the **Name** field, type the name of the new destination.
4. Specify the type of destination (see Table 44) and then specify information for the new destination.
5. When you have defined the new destination, click **OK**.

   The **Destinations** list includes the new destination.

TABLE 44. Quick Connect Properties: Destination types

Destination Type	Section	Field/ Button	Description
Windows Folder, Novell NetWare Folder, FTP Folder, WebDAV Folder	**Folder location**	Path to the folder	Destination information for the scanned documents. For Windows or Novell folders, click the Browse button and then select an existing folder or create a new folder and then select it. For an FTP folder, enter the FTP location, such as "ftp://ftp01/scans". (The Browse button is not available for FTP folders.) For a WebDAV folder, enter the Web location, such as "http:/10.10.10.100/scans" or "https:/10.10.10.100/scans".
		Enable subfolder navigation	Enables users to select a subfolder at the device.
		Maximum folder level	The number of folder levels down that users may navigate.
		Acquire Scheme	Applies only to WebDAV Folder option. Enables you to select an authentication scheme (NTLM, NTLM/ Kerberos, or Basic.) After selecting the scheme, the authentication options specified in the scheme are enabled.

TABLE 44. Quick Connect Properties: Destination types (continued)

Destination Type	Section	Field/ Button	Description
	Authentication	Authenticate User	The options are: ■ None: Sends scanned documents to the destination without requiring user authentication. The Services Manager requires write access to the destination. ■ Logon as: Sends scanned documents to the destination using the specified authentication information; the user does not need to enter authentication information at the device. Specify the domain/tree, user ID, and password to use for authentication. The specified account requires write access to the destination. ■ RunTime: The user at the device must log on to the destination before the scanned document is sent. You specify the domain/tree to use for authentication. **Note:** If you select FTP Folder as a destination type and Session Logon is enabled, eCopy recommends that you select "None" or "Logon as" as the authentication type.

TABLE 44. Quick Connect Properties: Destination types (continued)

Destination Type	Section	Field/ Button	Description
SMTP Message	**SMTP Server**	Name	The name of the server to use when sending scanned documents.
		Port	The port number of the server.
	Send From	Personal Account	Sends scanned documents from the user's personal e-mail account.
		Generic account	Sends scanned documents from a generic account. Use this field to specify the return address that will always be used by the connector.
		Cc: Sender	Sends a copy of scanned documents to the sender.
		Authenticate user and Domain (available only if you select the Personal account option)	The options are: ■ Windows: Sends scanned documents from the personal account in the specified Windows domain. ■ Novell NetWare: Sends scanned documents from the personal account in the specified Novell tree. ■ LDAP: Sends scanned documents from the personal account specified in the LDAP Server Settings window **Note:** If you select SMTP Message as the destination type and Session Logon is enabled, eCopy recommends that you select the same authentication type that you selected for Session Logon.
	Destination	To	Specifies SMTP destinations. You add recipients by clicking Add and then entering an SMTP address in the Add Recipient window.
		Subject	A subject line for the message.
Database	**Destination**	Data source, Catalog, Table, and Column	Sets a database as a destination, enabling users at the device to scan documents and store them in the destination database. Database mapping allows you to store the name of the document and the file extension. For information about setting a database destination, see page 225.

TABLE 44. Quick Connect Properties: Destination types (continued)

Destination Type	Section	Field/ Button	Description
Destination List	**Destinations**	Name, Location, and Network	Enables you to create a list of destinations to which the connector profile can send scanned documents. When you add a destination to the list, you specify the destination name, type, and location, as well as the authentication information. The New destination window then lists all the destinations. **Note:** To make sure that users have to log on, at most once, at the device, you cannot mix certain combinations of destination type and authentication in a destination list. For example, if you add a Windows Folder destination that uses Runtime authentication to the destination list, you cannot then add a Novell NetWare Folder destination that uses Runtime authentication. If you add a Windows Folder or Novell NetWare Folder destination that uses Runtime authentication, and you then add an FTP Folder destination, a message appears indicating that the user's Windows or Novell credentials will be used to authenticate against the FTP server. Invalid options will not be available in the Authenticate User list.

Defining a file naming field

The file name generated at the eCopy-enabled device is composed of one or more fields. Quick Connect includes several file naming options:

- You can configure a connector profile to use the default file name, which names scanned documents using the following format:

  format: `device-connector-date-time.ext`

  result: `machine01-QuickConnect1-03172005-112259.pdf`

- You can build a file name using fields that you define. For example, you can build a file name that contains the company name, the date, and the time, as in the following example:

  `eCopy03172005141847.pdf`

- You can specify whether users can modify all or part of the file name. For example, you can build a file name that contains the company name, a city, the date, and the time. You can allow users to modify the city name, but not the company name, as in the following example:

  `"eCopyParis03172005142327.pdf", "eCopyRome03172005142327.pdf", "eCopyLondon03172005142327.pdf"`

You use the Field Editor (see Table 17) to define the fields to use in a file name and their default values. The Default, User modify, and Required fields are not available with all field types.

The following options are available if a scanned document already exists in a selected destination:

TABLE 45. Quick Connect Properties: File Name tab

Option	Description
Overwrite always	Replaces an existing scanned document with the one the connector is currently saving.
Return error	Displays an error message prompting the user at the device to change the file name.
Create unique file name	Adds a unique number to the file name, for example "filename.1", "filename.2". The scanned document is saved to the specified destination using a unique file name and the existing document is not overwritten.

To define file naming fields:

1. Select the **File Name** tab.
2. Click **New**.
3. Use the Field Editor (see Table 17) to define a file name field and its default values.
   The **Default**, **User modify**, and **Required** fields are not available with all field types.
4. Click **OK**.
5. Repeat this procedure for each new file naming field.
6. Click **Save**, select or specify the profile name, and then click **Save**.

Defining index fields

When you configure Quick Connect's document indexing option, the connector prompts the user to enter information in one or more fields. The information describes the content of the document, such as a case ID, a client name, or a document type. Quick Connect saves the index information with the scanned document. This option is useful with back-end applications that can process the scanned documents (image files) and index files in the destination folder.

To define index fields:

1. Select the **Index File** tab.
2. Click **New**.
3. Use the Index Field Editor (see Table 17) to define an index field and its default values.
   The **Default**, **User modify**, and **Required** fields are not available with all field types.
4. Click **OK**.
5. Repeat this procedure for each new index field.
6. Click **Save**, select or specify the profile name, and then click **Save**.

Configuring an index file

When a user enters indexing information at a device, Quick Connect writes the field names and their values to an index file or to a database table. The index file has the same name as the scanned document, but has a different file extension. The available formats of the index file are:

- XML
- CSV (comma-separated value)
- TSV (tab-separated value)
- Database

Examples

CSV

```
Case_Number,Client,Operator135643,eCopy,sjones
```

XML

```
<?xmlversion="1.0" encoding="UTF-8" ?>
<Data>
   <index id=”Case_Number”>135643</index>
   <index id=”Client”>eCopy</index>
   <index id=”Operator”>sjones</index>
</Data>
```

When the Batching option is enabled on the Document Settings tab (see Table 23), you can configure Quick Connect to create a single index file that will record the index values entered at the device for all the scan jobs in a batch.

- The connector uses the information on the File Name tab to generate a name for the index file (see page 221); if you do not configure a file name, the connector uses the default file naming rule.

  If the naming rule includes the Batch Number field, the connector sets the current batch number in that field; otherwise, the connector adds an underscore (_) to the batching number, as in “document-20070131_1.pdf”.

  If a file name already exists and the Create unique file name option is configured, the connector adds a period to the rolling number, as in “document-20070131_1.1.pdf”.

- There are three types of index values. The type of index value determines the frequency of changes to index values (see Table 46).

TABLE 46. Quick Connect: Types of index values

Type of index value	Description	Used with following field types
System	The index field retains the same index value when the user at the device starts a new scan job.	Device Name
Scan Job	The index values in index fields of this type are the same for the entire scan job.	Alphanumeric Numeric Date Time List Logged on user Destination path Database
Batching Job	A scan job can comprise multiple batching jobs. The index values in index fields of this type change for each batching job.	File name Number of pages File size

- The Repeat unchanging index values option enables you to record the index values for a batch job each time the user enters the index values, even if the user at the device enters the same index values many times.

  If you do not select this option, the connector records the system- and scan job-dependent index values only once.

  Since batching job-dependent index values have different values based on the batching job, they will be recorded multiple times, by default. However, if there is only a single batching job, the index values will be treated like system- and scan job-dependent values.

  If you select this option, batching job-dependent index values will be recorded in a different node (for an XML file) or a different row (for CSV and TSV files, and database tables). This does not apply when the connector is processing only one batch scanning job.

To configure the index file:

1. Select the **Index File** tab.
2. In the **File Format** area, select the format of the index file.
3. If the Batching option is enabled and you want to create a single index file, select **Create single index file when Batching is enabled**.
4. If you want to duplicate unchanging index values, select **Repeat unchanging index values**.
5. Click **Save**, select or specify the profile name, and then click **Save**.

Setting a database as a destination

Setting a database as a destination enables you to configure a connector profile so that users at the device can scan and index documents and store them in the specified database. You can configure the profile to store the index information in a file, in the same database as the scanned document, or in a different database.

When you set a database as a destination, you can use the Map Document Destination feature to map the name and file extension of the scanned document to STRING fields in a table in the database. This enables you, or a database administrator, to create associations between the scanned document and any index information that the user enters on the Index screen for the document, wherever that index information is stored.

To set a database as a destination:

1. In the console tree, select **Quick Connect** > **Properties** > **Destinations** and then click **New**.

   The **New destination** window opens.
2. In the **Name** field, enter a name for the destination.
3. In the **Type** list, select **Database**.

4 Configure the data source (see page 230).

When you have successfully configured the data source, the **Data Field Selector** window opens.

5 On the **Map Document Destination** tab, under **Select Table Name**, select a table.

The **Database Fields** list displays only those columns that have been defined as IMAGE or STRING data types. Quick Connect stores documents in IMAGE fields and file names in STRING fields.

6 Under **Map Fields**, select the Quick Connect field that you want to map to a database field.

The **Data Field Selector** window displays a maximum of three Quick Connect fields that you can map to database fields in the selected table. The fields allow you to store the document data (the scanned document), document name, and document extension.

7 In the **Database Field** column, select the target field.

An administrator with knowledge of the database should know what data type to select for each Quick Connect field. For example, the **Document Data (BLOB)** field must be mapped to an IMAGE data type field for SQL and Access databases or to a BLOB data type field for Oracle databases.

8 Click **OK**.

The **New destination** window displays the database settings.

9 Click **OK** to save the settings.

The **Destinations** list displays the name and summary information for the database destination you created.

Mapping index fields to fields in a database

This feature enables you to specify a database to store index values entered at an eCopy-enabled device. You can map any type of Quick Connect index field to fields in an SQL, Access, or Oracle database. When a user enters values in mapped index fields, the connector profile stores the values in the associated database fields.

Note: The connector profile stores all mapped index values in the target database as STRING data, regardless of the type of index field.

If you are storing scanned documents in a database and you want to create a relationship between the database fields where the documents are stored and the database fields where the index values are stored, make sure that one of the mapped index fields is of the type "File Name". Index fields of type "File Name" automatically use the file name of the scanned document that is stored in the database destination.

Example:

You configured a connector profile to scan insurance claims using the following file naming format:

`<eCopy><Claims><Date><Time>`

You configured the profile to store the scanned documents, named as shown below, in the target database:

`eCopyClaims20060523123318.pdf`

`eCopyClaims20060523123319.pdf`

`eCopyClaims20060523123320.pdf`

You created several Quick Connect index fields to capture account information and mapped them to fields in a database.

To associate the database record used to store the scanned documents with the database record used to store the scanned document's index values, you must have an index field of type "File Name" that captures the file name during scanning.

If you modify the name of an index field, the mapping becomes invalid. You must always re-map mapped index fields after you change them.

You can map one index field to one database field.

To map index fields to fields in a database:

1. In the console tree, select **Quick Connect** > **Properties**.
2. Select the **Index File** tab, click **New**, and then define each index field that you want to map (see page 222).
3. Under **File Format**, select **Database** and then click **Map Fields**.

   If you have not yet configured a data source, configure it now (see page 230).

   If you previously configured a data source, the **Data Field Selector** window opens. It displays the connection information.

   - To use the current data source, proceed to step 4.
   - If you do not want to use the current data source, click **Modify** to select a different data source. When the **Select Recent Data Source** window opens, click **New** and follow the instructions for configuring a new data source (see page 230).
4. On the **Map Database Fields** tab, under **Select Table Name**, select a table.
5. Under **Map Fields**, which displays the index fields that you created, select the Quick Connect index field that you want to map to a database field. You do not have to map all the Quick Connect fields.

   In the **Database Field** column, which only displays fields of STRING data type, select the target field. The index values that the user at the device enters in the index fields will be stored in the database fields after the document is scanned.
6. Click **OK** to save the settings and return to the **Index File** tab.

Note: The Index File tab does not indicate whether an index field is mapped to a database field.

Using a database as the source of field values

You can create a file name field or an index field that uses a database as the source of field values. Users at the device can then select from a list of available values for that field.

If the database administrator modifies, in a database, values that are associated with a Quick Connect field, users will have access to the changed values. You do not need to make any changes to the field in the Administration console.

To use a database as the source of field values:

1. In the console tree, select **Quick Connect** > **Properties** > **File Name** or **Index File**.
2. Click **New**.

   The **Field Editor** or **Index Field Editor** window opens.
3. In the **Name** field, enter a name for the new field.
4. In the **Type** field, select **Database** as the type.
5. Configure the database.

   If you have previously configured a data source, the **Select Recent Data Source** window opens.

   - To use an existing data source, select it and then click **OK**.
   - If you do not want to use an existing data source, click **New**. The **Configure Data Source** window opens. Follow the instructions for configuring a new data source (see page 230).

   If you have not previously configured a data source, the **Configure Data Source** window opens. Follow the instructions for configuring a new data source (see page 230).

   After selecting or configuring a data source, the **Data Field Selector** window opens.
6. On the **Choose Field** tab, select a table, select a column in the table, and then select the default file name or index value from the list of available values. The user at the device can accept the default value for the field or select a value from the list.
7. Click **OK** to return to the **Field Editor** or **Index Field Editor** window.

   The window displays the settings you have configured.
8. Select the **Required** option if you want to require users at the device to specify a file name or index value.
9. Click **OK** to save the settings and return to the **File Name** or **Index File** tab.

   The tab displays the name and summary information for the Database field you created.

Configuring a data source

You can configure an existing data source or a new data source.

To configure an existing data source:

1. If the **Select Recent Data Source** window opens, select the data source that you want to use and then click **OK**.

   The **Data Field Selector** window opens.

2. Perform one of the following functions:
   - Map the document destination for the index fields (see page 226).
   - Map Quick Connect index fields to database fields (see page 228).
   - Set the default values for file name or index fields that will use a database as the source of values (see page 229).

To configure a new data source:

1. In the **New destination** window, click **Configure**.

   The **Configure Data Source** window opens.

2. Select the database type.
3. Specify the appropriate settings (see Table 47).
4. After specifying the settings, click **Test Connection**.
5. When the system displays the "Successfully attached to the database" message, click **OK** twice.

   The **Data Field Selector** window opens.

6. Perform one of the following functions:
   - Map the document destination for the index fields (see page 226).
   - Map Quick Connect index fields to database fields (see page 228).
   - Set the default values for file name or index fields that will use a database as the source of values (see page 229).

TABLE 47. Quick Connect: Database types and settings

Database type	Settings
Microsoft Access	Specifies the path to the Access database (*.MDB), which can be on a local drive or on a Universal Naming Convention (UNC) path. If the database is on a local drive and does not require a user name and password, select the Blank Username and Password check box. If the database is on a UNC path, enter the appropriate credentials. The user must have permission to access the specified path.
Microsoft SQL	Specifies the SQL server, user name, and password used to access the SQL Server, and the Catalog/Database. ■ SQL Server: The SQL server that you want to use. If the Microsoft Data Access Objects component is installed on the computer, the system automatically fills the SQL Server list with the names of SQL servers on the local segment of the network and you can select the server from the list. If MDAO is not installed, you can type the server name in the field. ■ Username: SQL server user name. ■ Password: Password for the specified user. ■ Catalog/Database: The database where you want to start browsing tables. You can select the catalog or database from the list, if MDAO is installed, or you can type the catalog or database name in the field.
Oracle	Specifies the listener, user name, and password used to access the Oracle database. ■ TNS Name: Listener on the Oracle database server. ■ Username: Oracle user name for the integrated security user on the target database. ■ Password: Oracle password for the specified user.

Scan to eCopy Desktop™

The eCopy™ Scan to eCopy Desktop Connector enables ShareScan users at an eCopy-enabled device to scan documents and send them to recipients' scan inboxes or to network home directory folders, where the scanned documents can be retrieved by eCopy Desktop. For information about using eCopy Desktop, refer to the eCopy Desktop documentation or Help.

Depending on the configuration of the connector, the recipient may be the user scanning the document or any other eCopy Desktop user whose scan inbox is set up to receive scanned documents via the connector. The connector can also be configured to send scanned documents to Windows, Novell, or FTP folders.

The following list provides several notes about this connector:

- When a ShareScan user at an eCopy-enabled device chooses a recipient, the scanned document is delivered to the recipient's scan inbox or to the specified folder in the recipient's network home directory.
- You can configure the connector to secure the scan inboxes of recipients. Users must enter the network password associated with a recipient's scan inbox before the connector can send scanned documents to the scan inbox. The Authenticate users option is automatically selected when the inbox type is set to "Home Directories".

  Any user can send a scanned document to any user's scan inbox. However, only the owner can read from the scan inbox.
- The list of available recipients that appears on the Specify Recipient screen (in the ShareScan Client) includes all users in the Windows Active Directory or Novell eDirectory, unless you restrict usage by choosing a base DN that limits the scope of the search.

About eCopy Desktop scan inboxes and home directories

eCopy Desktop can use both scan inboxes and network home directories to store scanned documents received from the Scan to eCopy Desktop Connector:

- **Scan inboxes:** The connector creates scan inboxes when users first use the connector at a device. The connector creates scan inboxes in folders located beneath the Inbox root directory.

  When the connector creates scan inboxes, it assigns the permissions needed to ensure the appropriate level of scan inbox privacy. The connector uses the ShareScan Administrator group you designate in the Scan to Desktop Properties window to implement the required security.

TABLE 48. Scan to eCopy Desktop: Security for scan inboxes

System	Role	Permissions
Windows Active Directory	Administrators	Full control
	Domain Administrators	Full control Not used in workgroups
	<groupname> (your designated ShareScan Administrator group)	Full control
	<owner>	Read or Delete
Novell (NDS)	Admin	Full control
	<groupname> (your designated ShareScan Administrator group)	Full control
	<owner>	Full control

- **Home Directories:** The network administrator must create these directories. If you configure the connector to use a network home directory to store scanned documents, the connector automatically uses the Scan to Self and Authenticate Users options.

  Network security ensures that only the Local Administrator, the ShareScan Administrator, and the local user can read from or write to the root of the network home directory or to the specified subdirectory. Scan to eCopy Desktop must connect to the specified folder as the owner of the home directory.

  Important! Network home directories configured through a logon script are not supported.

You configure a Scan to eCopy Desktop connector profile to scan to a single inbox type: scan inboxes or network home directories. You cannot configure the connector profile to scan to both types of inboxes. However, if you modify the inbox type in the connector profile, so that some users have scan inboxes while others have network home directories, both types of inboxes can co-exist on the same system.

The following table shows sample scan inbox paths:

TABLE 49. Sample scan inbox locations

System	User	Domain	Inbox path
Windows Active Directory	User1	Using the Single domain mode option (recommended)	*Inbox_Root*\User1
Windows Active Directory	User1	Using the Multiple domain mode option (only if required)	*Inbox_Root*\xyz.com\User1
Novell (NDS)	Cn=testuser ou=engineering 0=eCopy	When using the Use user ID for folder names option (recommended)	*Inbox_Root*\.testuser.engineering.ecopy
Novell (NDS)	Cn=testuser ou=engineering 0=eCopy	When using the Use eDirectory hierarchy (only if required)	*Inbox_Root*\eCopy\engineering\testuser

About the Inbox root directory

The Inbox root directory, which was called "Inbox Management Directory" in previous versions of ShareScan, contains scan inboxes and a file named "userdirs.txt". When users at a device use the connector for the first time, their names and the paths to their scan inboxes or network home directories are added to the userdirs.txt file.

The Inbox Agent uses the userdirs.txt file to provide eCopy Desktop with the path information that eCopy Desktop needs to connect to scan inboxes or network home directories (see page 245).

Before you can use the Scan to eCopy Desktop Connector, you must configure the Inbox root directory (see page 237).

The connector automatically assigns specific file and folder permissions to ensure inbox security (see Table 50 or see Table 51) depending on your network environment.

TABLE 50. Inbox root directory permissions (Windows)

File or folder	Role	Permissions
<Inbox root directory>	Administrators	Full control: applied automatically
	Domain Admins (not used in workgroups)	Full control: applied automatically
	<groupname> (your designated ShareScan Administrator group)	Full control: applied automatically.
	Everyone	List folder: applied manually.
userdirs.txt	Administrators	Full control: applied automatically.
	Domain Admins (not used in workgroups)	Full control: applied automatically.
	<groupname> (your designated ShareScan Administrator group)	Full control: applied automatically.
	Everyone	None: applied manually.

TABLE 51. Inbox root directory permissions (Novell NetWare [NDS])

File or folder	Role	Permissions
<Inbox root directory>	Admin	Full control
	Domain Admins (not used in workgroups)	Full control: applied automatically
	<groupname> (your designated ShareScan Administrator group)	Full control
	Everyone	File scan
userdirs.txt	Admin	Full control
	Domain Admins (not used in workgroups)	Full control: applied automatically
	<groupname> (your designated ShareScan Administrator group)	Full control
	Everyone	None

Supporting multiple Inbox root directories

For information on the support of multiple Inbox root directories, refer to the Ask eCopy knowledge base, or contact eCopy Customer Support.

Preconfiguring Scan to eCopy Desktop

Notes: If you are migrating from an earlier version of eCopy ShareScan and have already configured an Inbox root directory, you can use the existing location and settings. You can also import profiles from earlier versions of the connector using the Import / Export tool in the Administration console. For more information see the Administration console Help.
If you have a Novell network with multiple trees, you must set the Preferred tree field in the Novell client configuration so that the eCopy Inbox Agent and Scan to eCopy Desktop Connector will function properly.

Before you can configure Scan to eCopy Desktop in the Administration console, a network administrator must complete the following steps.

To preconfigure Scan to eCopy Desktop:

1. Create the Inbox root directory. If the directory is on a Microsoft or Novell network, you must share it.
2. Create a service account that will deliver scanned documents to scan inboxes or to network home directories.
3. Add the service account to a new or existing group in one of the following locations:
   - On the domain controller, for Windows domain-based networks.
   - On NDS , for Novell networks.
   - On the local machine, for workgroups.

   ShareScan uses this group when assigning permissions to the Inbox root directory and scan inboxes.

   Note: If multiple Services Managers are pointing to the same userdirs.txt file in the Inbox root directory, the group to which the service account belongs must be identical on all those Services Managers.

4. Give the group Full Control access rights to the Inbox root directory.
5. For workgroup implementations only, on the PC where the scan inboxes are located, create a local account for each user of Scan to eCopy Desktop.

Configuring Scan to eCopy Desktop

After completing the pre-configuration steps, you can configure the connector.

To configure Scan to eCopy Desktop Connector properties:

1. In the console tree, click **Scan to Desktop** > **Properties**.
2. Select the **Display** tab and then specify the settings (see Table 14).
3. Select the **Configure** tab.
4. Select **Scan Inbox/Home Folder Settings** and then click **Properties**.
5. In the **Environment Type** list, select the environment type, specify the settings (see Table 52 and see Table 53), and then click **OK**.
6. If the connector profile uses destinations, select **Destination Settings**, click **Properties**, specify the settings (see Table 54 and see Table 55), and then click **OK**.

   This option allows you to send scanned documents to network locations, such as Windows, Novell, or FTP folders.
7. Select **Inbox Agent > Start Service**. The Inbox Agent provides eCopy Desktop with the path information that eCopy Desktop needs to connect to scan inboxes or network home directories.

   The first time you click **Start Service**, the Inbox Agent registry settings are automatically configured.
8. Click **Save**, select or specify the profile name, and then click **Save**.

Scan Inbox/Home Folder settings

The environment settings depend on the environment type that you select in the Scan to Desktop Properties window. The general settings are the same for all environments. The connector supports the following environments:

- Windows Active Directory
- Novell eDirectory
- Local Computer (Workgroup): Select this option if you do not have a domain controller or NetWare server on your network, or if you are authenticating in a workgroup. If you select this option, each user must have an account on the local computer.

TABLE 52. Scan to eCopy Desktop Properties: Environment settings

Section	Field/Button	Description
Service Account	User Name Password	The authentication information for the administrative user account created by your network administrator. If you select Windows Active Directory as the environment type, you must also specify a domain. If you select Novell eDirectory as the environment type, you must also specify a tree.
	Advanced	Enables you to configure the Advanced Account Settings.
	Test	Validates the authentication information. If validation is successful, the user name turns blue. If the user name remains red, make sure that the account is a member of your designated ShareScan Administrator group.
ShareScan Administrator	Group	When the test is successful, the Group field is populated with the list of groups to which the service account belongs.
Inbox Root	UNC Path	Specifies the path to the Inbox root directory. If the system prompts you to update permissions, click the Yes button; this ensures the security of scan inboxes and of the userdirs.txt file. The system creates an empty userdirs.txt file in the selected directory (unless a file already exists).
(Windows environment)	Single domain mode (recommended)	Select this option if you upgraded from a version of ShareScan prior to version 4.2, or if you are running ShareScan 4.2 as well as prior versions of ShareScan in the same environment.
	Multiple domain mode (only if required)	Select this option only if you are running ShareScan 4.2 exclusively.
(Novell environment)	Use user ID for folder names (recommended)	Select this option if you upgraded from a version of ShareScan prior to version 4.2, or if you are running ShareScan 4.2 as well as prior versions of ShareScan in the same environment.
	Use eDirectory hierarchy (only if required)	Select this option only if you are running ShareScan 4.2 exclusively.

TABLE 53. Scan to eCopy Desktop Properties: General settings

Section	Field/Button	Description
Inbox Settings	Inbox Type	Scan Inboxes: Scans documents to scan inboxes. Home Directories: Scans documents to a network home directory. This option is not available if you select Local Computer (Workgroup) as the environment type.
	Recipient Type	Multiple: Enables users at the device to select multiple recipients for scanned documents. This option is not available if you select Home Directories as the inbox type. Scan To Self: Sends the scanned documents to the logged-on user's scan inbox or network home directory.
	Subdirectory	Available when you select Home Directories as the inbox type. eCopy recommends that you scan to a subdirectory in the network home directory. If the subdirectory does not exist at the time of scanning, the connector will create it using the credentials of the authenticated user. Even if you select this option, users can select existing scan inboxes to receive scanned documents.
	Authenticate Users	Secures the scan inboxes of recipients. Users must enter the network password associated with the recipient's scan inbox to send scanned documents. This option can only be modified if you select Scan Inboxes as the Inbox Type and Multiple as the Recipient Type.
Search	Search while typing	Enables or disables the Search while typing function at the device.
If a scanned image file already exists		Specifies the action for the connector to take if the recipient's scan inbox already contains a scanned document with the same file name: ■ Overwrite Always: Overwrites any file with the same name. ■ Show Error Message: Displays a message prompting the user to specify a new file name.

Destination settings

Scan to eCopy Desktop enables you to scan to the following destination types:

- Windows Folder
- Novell Folder
- FTP Folder

For each type of folder you must supply the folder location and authentication settings.

TABLE 54. Scan to eCopy Desktop: Destination settings

Section	Field	Description
Folder Location (For an FTP folder you must enter and test the authentication information before you select a folder location.)	path to the folder	Destination information for the scanned documents. For Windows or Novell, click the Browse button and then select an existing folder or create a new folder and then select it. For an FTP folder, enter the FTP location, such as "ftp://ftp01/scans". (The Browse button is not available for FTP folders.)
	Enable subfolder navigation	Enables users to select a subfolder at the device.
	Maximum folder levels	The number of folder levels down that users may navigate.

TABLE 54. Scan to eCopy Desktop: Destination settings (continued)

Section	Field	Description
Authentication	Authenticate User	The options are: ■ None: Sends scanned documents to a local destination without requiring user authentication. The service account requires write access to the destination. ■ Specify Credentials (Authenticate user at runtime): After selecting this option, you specify the user ID, password, and domain. This enables the type-ahead function at the device. Users log on at the device using their network credentials, which are then used to store any documents that are scanned using this connector profile. ■ Specify Credentials (No runtime authentication): Afer selecting this option, you specify the user ID, password, and domain. The specified account, which requires write access to the destination, is used to store documents that are scanned using this connector profile. The user at the device is not required to log on. ■ Runtime credentials from Scan to Desktop: Uses the Runtime credentials specified through the Scan Inbox/Home Folder Settings. Use this option if you are configuring the connector to scan to both a destination and a scan inbox or home folder during the same scanning session. At the device, the connector authenticates the user using the specified credentials and does not prompt the user to log on when the user sends to a destination. ■ Service account from Scan to Desktop: Uses the service account credentials. The service account requires write acess to the destination. The user at the device is not required to log on. For Windows/Novell folders, you specify the domain/tree, user ID, and password to use for authentication. For FTP folders, you specify the user ID and password. **Note:** If you select FTP Folder as a destination type and Session Logon is enabled, eCopy recommends that you select "None" or "Specify Credentials (Authenticate user at runtime" as the authentication type.
	Advanced	Enables you to configure the Advanced Account Settings.

Advanced account settings are used in the configuration of scan inboxes and destinations for Windows Active Directory and Novell eDirectory.

TABLE 55. Scan to eCopy Desktop: Advanced Account settings

Environment type	Field name	Description
Windows Active Directory	Global Catalog Server settings	Locate server at runtime: Enables the user to select a server at the device. Always use the following server: The name of the Global Catalog Server to be used at the device.
	LDAP Port	The port that you want the server to use. Default is 3268.
	Server requires SSL for communication:	Select this option if the Global Catalog Server requires a Secure Socket Layer (SSL).
	Base DN	Defines a starting point for the Global Catalog Server search that takes place from the authentication window at the device. When you select a base DN (Distinguished Name), the Search while typing option searches the forest below the location of the Base DN. The Browse button opens the Start Search At window, where you can select a Base DN in the Active Directory forest. Only users within the DN can authenticate. However, documents can be sent to any user in the forest. If this field is left blank, the search includes the entire forest.
	Domain Controller settings	LDAP Port: The port that you want the domain controller to use. Default is 389. Server requires SSL for communication: Select this option if the Global Catalog Server requires a Secure Socket Layer (SSL).

TABLE 55. Scan to eCopy Desktop: Advanced Account settings (continued)

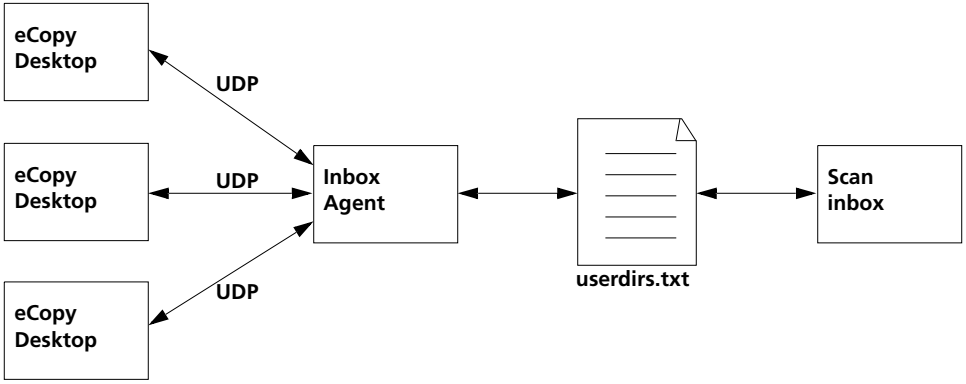
Environment type	Field name	Description
Novell eDirectory	Novell eDirectory Server settings	Locate server at runtime: Enables the user to select a server at the device. Always use the following server: The name of the Novell eDirectory Server to be used at the device.
	LDAP Port	The port that you want the server to use. Default is 389.
	Server requires SSL for communication	Select this option if the Novell eDirectory Server requires a Secure Socket Layer (SSL).
	Server allows Anonymous Bind	eDirectory can obtain information from the server without authenticating the user.
	Search On	The search criterion that the server uses to find the sender: ■ First Name ■ Last Name ■ Common Name ■ User ID The setting defines the information that the user sees on the Logon screen at the device.
	Base DN	Defines a starting point for the Global Catalog Server search that takes place from the authentication window at the device. When you select a base DN (Distinguished Name), the Search while typing option searches the forest below the location of the Base DN. The browse button opens the Start Search At window, where you can select a Base DN in the Novell forest. Only users within the DN can authenticate; however, documents can be sent to any user in the forest. If this field is left blank, the search includes the entire forest. Examples of potential base DNs are: ■ "DC=ecopy" ■ "CN=users" ■ "DC=ecopy "DC=com" ■ "OU=marketing,DC=ecopy"

To configure Scan to eCopy Desktop Connector services:

1. In the console tree, select **Scan to Desktop** > **Services**.
2. Configure the connector services (see page 169).
3. Click **Save**, select the profile name, and then click **Save**.

About the Inbox Agent

The eCopy Inbox Agent is a Windows service that is installed with the Services Manager. It uses the userdirs.txt file to provide eCopy Desktop with the path information that eCopy Desktop needs to connect to scan inboxes or network home directories. eCopy Desktop uses the UDP (User Datagram Protocol) to communicate with the Inbox Agent.



Important! The default UDP server port is 9999 and the client port is 8888. The default multicast server and client IP address is 239.254.5.6. If you need to change these settings, contact Customer Support for assistance.

Example

If you are logged on to your PC as <*auser*>, eCopy Desktop sends a UDP message to the Inbox Agent requesting the path to your scan inbox. The Inbox Agent looks up <*auser*> in the userdirs.txt file and returns the path to eCopy Desktop, which uses it to open <*auser*>'s scan inbox.

If you do not enable the Inbox Agent, each eCopy Desktop user must manually configure the path to the scan inbox. For information about configuring eCopy Desktop, see the eCopy Desktop documentation or Help.

Scan to Printer

The eCopy Scan to Printer Connector enables users at an eCopy-enabled device to scan and print documents to a network printer, regardless of its physical location. Users can select various printing and page layout options.

To configure eCopy Scan to Printer Connector properties:

1. In the console tree, select **Scan to Printer** > **Properties**.
2. Select the **Display** tab and then specify the settings (see Table 14).
3. Select the **Configure** tab and then specify the settings (see Table 56).
4. Click **Save**, select or specify the profile name, and then click **Save**.

TABLE 56. Scan to Printer Properties: Configure tab

Field/Button	Description
Enable Express Mode	Does not display the settings screen to the user at the device. The scanned documents print directly to the default printer, using the default print settings from the print driver.
Available Printers	The printers that will be available at the device.
Set default printer	Used to specify the default printer. The name of the default printer appears in blue at the top of the list.

To configure eCopy Scan to Printer Connector services:

1. In the console tree, select **Scan to Printer** > **Services**.
2. Configure the connector services (see page 165).
3. Click **Save**, select the profile name, and then click **Save**.

Reference: Managing eCopy-enabled devices

Managing eCopy-enabled devices involves various tasks, such as specifying the default device. For information about adding devices running ShareScan Embedded software, see the "Adding a device with an embedded Client" section in the installation guide provided with the embedded products.

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- Specifying advanced settings 252
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- Configuring the Document Tracking function 258
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Specifying a default device

You can specify a default device from which new devices inherit their initial configuration of connector profiles. For example, if the default device is configured to use the Exchange and Scan to Printer connectors, new devices are automatically configured to use the same connectors.

Note: Devices can only inherit connector profiles from a default device from the same manufacturer.

If you do not specify a default device, new devices will not be configured to use any connectors.

To specify the default device:

1. In the console tree, right-click the device name.
2. Select **Set as default device**.

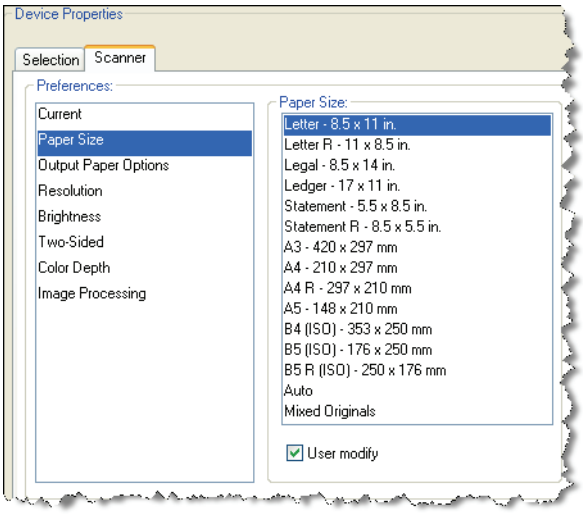
Specifying default scanner settings

You can specify default scanner settings for eCopy-enabled devices. (For information about attaching default scanner settings to a connector profile, see page 170.)

To specify default scanner settings for a device:

1. In the console tree, select **Devices** > <*device_name*> > **Properties**.
2. Select the **Scanner** tab.

   The information on the Preferences pane depends on the device you are using. See the Administration console Help for a table that describes some of the scanning preferences and associated options that you may see.



3. Specify the default scanner settings.

   The User modify option enables you to specify whether or not users at the device can override the default scanner settings (by pressing the Settings button)

4. Click **Save**.

Specifying advanced settings

When you configure a Ricoh Embedded device, you can specify the type of panel that the Client must use. This is useful because, with many different devices and panels available, it can be difficult for the Client to detect the correct type of panel. When you select the panel color, the Client can send correct information to the Services Manager about how to process the scanned documents and return them to the Client.

Since Ricoh devices are energy-efficient products that comply with the energy guidelines promoted by the Environmental Protection Association (EPA) ENERGY STAR program, the devices enter a "sleep", or low-power, state, after a certain period of inactivity, or "timeout'. You may want to prevent a device from entering a "sleep" state for the following reasons:

- If a device that you have already added to the console is in the "sleep" state when you start ShareScan Administration, the device will be marked by a red "x" in the console tree. This is because the Administration console can no longer verify Services Manager information for the device.
- If you try to add a device that is in a "sleep" state, the Administration console will not be able to detect it and, therefore, the device will not appear in the list of available devices.

To specify advanced settings:

1. In the console tree, select **Devices** > <*device_name*> > **Properties**.

   The **Device Properties** pane appears.

2. Select the **Tracing** tab.

   The information in the **eCopy Client Settings** area enables you to configure the capture of trace information; this information helps troubleshoot connector issues. You typically do this only when working with Technical Support. Tracing will slow down overall system performance..

3. Click **Advanced**.

   The **Advanced** window opens.

4. In the **Select Panel Color** list, select the color for the device you are configuring: **COLOR**, **GRAYSCALE**, or **MONOCHROME**.
5. If you need to prevent the device from entering a "sleep" state, make sure that the **Energy Star Compliant** option is not selected.
6. Click **Save**.

Configuring Activity Tracking

The Activity Tracking function writes detailed information about each job to a log file. Alternatively, you can use the eCopy Cost Recovery Service to integrate the selected device with an Equitrac or Copitrak terminal. For more information, see the *eCopy Cost Recovery Service Administrator's Guide*.

The Activity Tracking function enables you to perform the following tasks:

- Configure the Activity Logging function (see page 254)
- Configure additional activity tracking fields (see page 257)
- Configuring the Document Tracking function (see page 258)

Configuring the Activity Logging function

When the Activity Logging function is enabled for a device, the Services Manager generates a log file. The general format for each record in the log file is:

```
<Date>|<Time>|<Connector Label>|<Number of Pages in Document>|<Connector-Specific Fields>|<SUCCESS/FAILURE>|<Device Name>
```

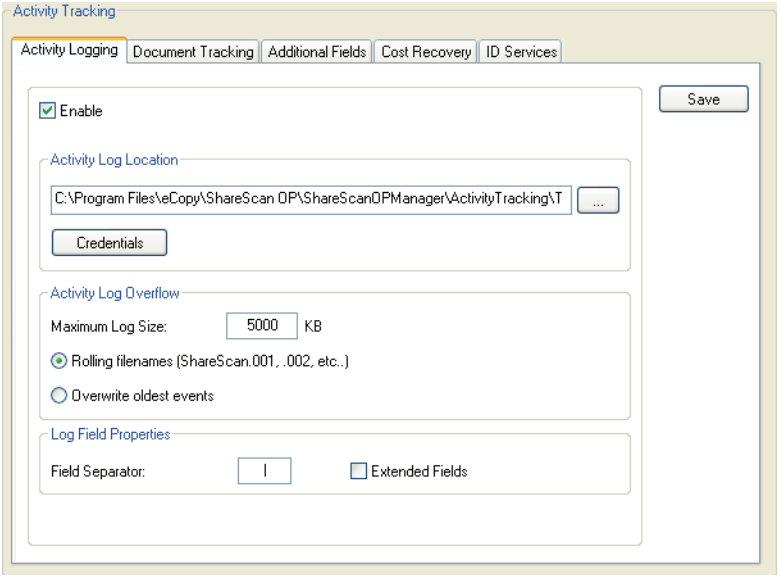
If you select the Extended Fields function, the log file includes the preceding fields and may include the following fields:

```
<Document Size>|<BATES- ON>|<DOC SENT>|<DOC TRACKED>|<USERNAME>|<DOMAIN>
```

If a user sends a scanned document to multiple recipients, each name is separated with a semicolon.

To configure the Activity Logging function:

1. In the console tree, select **Devices** > <*device_name*> > **Activity Tracking**.
2. Select the **Activity Logging** tab and then select **Enable**.



3. Specify the settings (see Table 57).
4. Click **Save**.

TABLE 57. Devices: Activity Logging tab

Section	Field/Button	Description
Activity Log Location	Activity Log Location field	The full path and file name for the log file, ShareScanOPActivity.log. The location must be in the current Windows domain or in a trusted Windows domain.
	Credentials	Enables you to create secured access to the log file. The Credentials button opens the Enter Credentials window where you enter the user name, password, and domain that are required to access the location of the log file. The specified user must have access rights to the location. If you choose to put the log file in a location on your local computer, you do not need to specify credentials. However, the Local System account must have access rights to the location.
Activity Log Overflow	Maximum Log Size	The maximum size for the log file, in kilobytes (KB).
	Rolling filenames	Specifies whether to use rolling file names when the existing log file reaches the maximum size and you want the system to create a new log file. When you select this option, the system renames the existing log file — "ShareScanOP.001", "ShareScanOP.002", etc. — and then creates the new log file.
	Overwrite oldest events	Specifies whether to overwrite existing entries, starting at the beginning of the log file.
Log Field Properties	Field Separator	The separator character to use between each log field. The following characters are valid: , / \ |* ? " < > :
	Extended Fields	Specifies additional fields to include in the log file, in addition to the basic fields (see Table 58). By default, this option is not selected.

TABLE 58. Activity Logging: Basic and Extended Fields

Field	Description
Date	The date the document was scanned.
Time	The time the document was scanned.
Connector label	The connector label specified on the Display tab.
Number of pages in document	The number of pages in the scanned document.
Connector-specific fields	Connector-specific fields. Typically this field in the log file includes "From", "To", "Recipients" and "Destination List" information.
SUCCESS / FAILURE	Specifies whether the scan job completed successfully or failed.
Device name	The name of the device, such as "User01".
Document size	The size in kilobytes of the scanned document.
BATES-ON	Records this information only if the Extended Fields option is selected and Bates Numbering Service is enabled for the current job.
DOC SENT	The file name of the scanned document that the connector creates and sends to a destination, such as: `USER589_EXCHANGE_01252007-104003.PDF`
DOC TRACKED	The file name of the copy of the scanned document that the Services Manager creates and stores in a document tracking folder, when the Document Tracking service (see page 258) is enabled for the connector profile, such as: `USER589_Exchange_01-25-2007-104009.pdf`
USERNAME	The name of the user logged on through Session Logon. In some cases the logged on user may not be the same as the user sending the scanned document. For example, when a connector is configured to use a generic e-mail account to send scanned documents, the Services Manager will record both the name of the logged on user and the name used for the generic e-mail account.
DOMAIN	The domain specified for Session Logon.

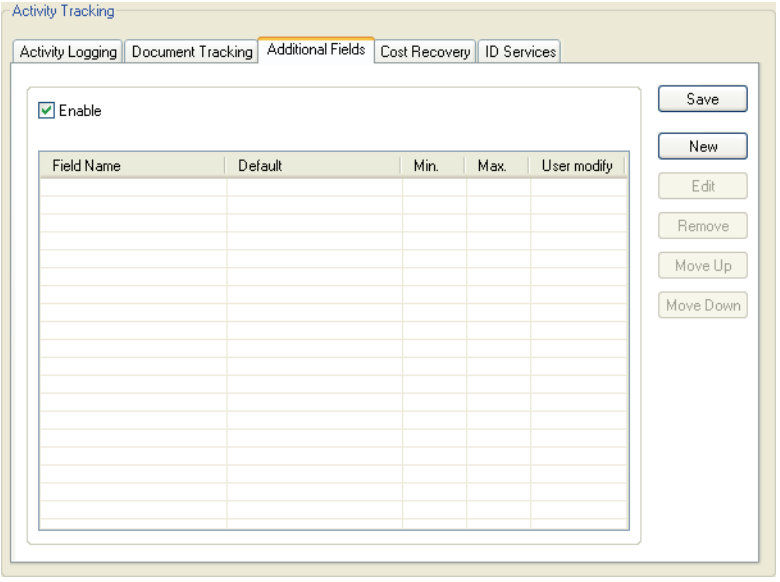
Configuring the Additional Fields function

The Additional Fields function enables you to obtain more tracking information, such as an account number or patient ID, from users at the device. The system prompts users to enter the information before the document is scanned. The system adds the information to each entry in the log file, immediately before the machine name.

Note: The Additional Fields function is not available if you are using the Cost Recovery Service.

To configure additional activity tracking fields:

1. In the console tree, select **Devices** > <*device_name*> > **Activity Tracking**.
2. Select the **Activity Logging** tab and then select **Enable**.
3. Select the **Additional Fields** tab and then select **Enable**.



4. To create a new activity tracking field, click **New**.
   The **Field Editor** window opens.
5. Specify the settings (see page 156) and then click **OK**.
6. Click **Save**.

Configuring the Document Tracking function

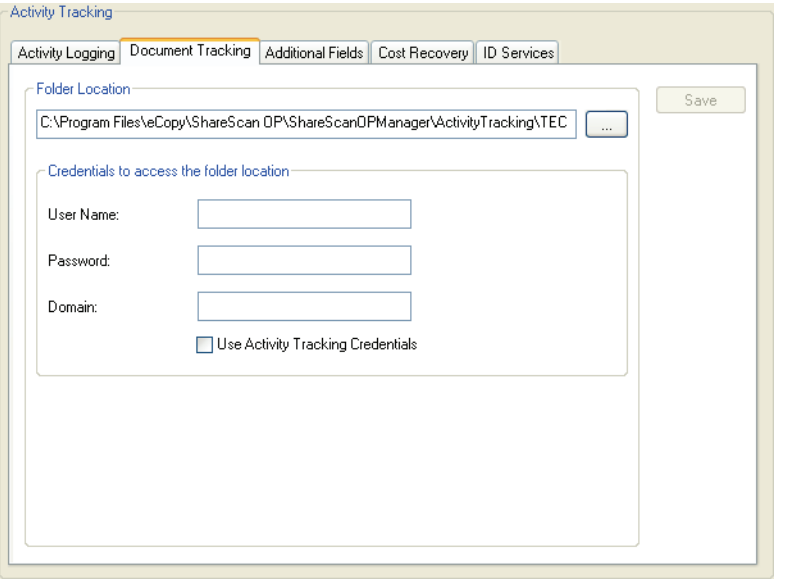
The Document Tracking function enables you to save a copy of every scanned document, as a PDF file, in a secure network location that is in the same domain as the Services Manager PC. This function also adds the name of the PDF file to the Activity Tracking log.

The Document Tracking function works only when Activity Tracking is enabled for the device.

You turn the Document Tracking function on or off for individual connector profiles (see Table 23).

To configure the Document Tracking function:

1. In the console tree, select **Devices** > <*device_name*> > **Activity Tracking**.
2. Select the **Activity Logging** tab and then select **Enable**.
3. Select the **Document Tracking** tab.



4. Specify the settings (see Table 59).
5. Click **Save**.

TABLE 59. Devices: Document Tracking folder settings

Section	Field	Description
Folder Location	Location field	The full path and file name for the folder. The location must be in the current Windows domain or in a trusted Windows domain.
Credentials to access the folder location	User Name	The user name, password, and domain that are required to access the folder. The user must have access rights to the specified location.
	Password	
	Domain	
	Use Activity Tracking Credentials	Uses the same credentials that are specified using the Credentials button on the Activity Logging tab. If you select this option, the system fills in the credentials on this screen.

Configuring the ID Services function

ID Services are available on compatible MFP devices that use identification devices such as card readers or proximity cards. ID Services allow user authentication credentials from the identification device to be encrypted and passed to ShareScan. This preserves security and streamlines the logon process by allowing the user to avoid entering authentication credentials at the device.

To configure ID Services:

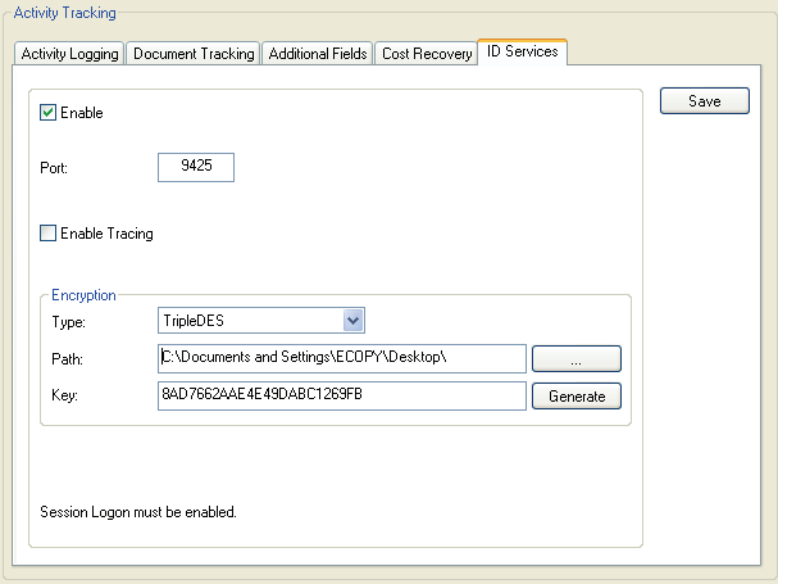
1. In the console tree, select the device for which you want to enable the ID Service and then select **Activity Tracking**.

   The right pane displays the Activity Tracking information.

2. On the **Activity Tracking** tab, select **Enable** and then click **Save**.

   ID Services cannot be activated unless Activity Tracking is enabled.

3. Select the **ID Services** tab.



4. Enable the service and specify the settings (see Table 60).
5. Click **Save**.

   The ID Service settings are saved for the selected device.

6 Verify that Session Logon is configured correctly:

- In the console tree, select **System Information > Properties**.
- Select the **Session Logon** tab.
- Depending on the requirements of your identification device, enable or disable the **Enable Session Logon** option.

TABLE 60. Devices: ID Service Settings

Section	Field Name	Description
ID Services	Enable	Enables all functions on the ID Services tab.
	Port	The port number must match the TCP port configured for the identification device. The default port is 9425.
	Enable Tracing	Writes ID Service transaction information to a trace file to help with troubleshooting. You typically only do this when you are working with Technical Support. Enabling tracing slows down overall system performance.
Encryption	Type	Enables encryption for your ID Service, if appropriate: ■ None: Passes credentials to ShareScan without encryption. ■ Triple DES: Enables you to encrypt the information that is sent from the application that is supplying the credentials to ShareScan. You do this by creating an encryption key that you store on the computer where the Services Manager is running and on the ID Service device.
	Path	Specifies a path to the storage destination for the encryption key on the device where the Services Manager is running.
	Key	Generates the encryption key and stores it in the file: `eCopyKey.txt`. You must manually copy this file to the ID Service device. If you regenerate the key, you must copy the new key to the ID Service device. **Important:** All devices that use ID Services and are managed by the same Services Manager must use the same encryption key. After generating a key for the first device, When you configure subsequent devices you must select the same path you selected for the first device. ShareScan automatically recognizes the key file that is already in the storage destination.

Publishing connector profiles

You can publish groups of connector profiles to one or more eCopy-enabled devices. You can publish to eCopy ScanStation™ devices and to devices running eCopy ShareScan Embedded software at the same time.

Publishing prerequisites

Following these rules helps ensure that a published group of connector profiles runs successfully on the target devices:

- The source device cannot be the same as any of the target devices.
- The source device and the target devices must be in the same domain.
- File paths that you specify during publishing must be valid on the target devices.
- The version level of third-party client software, such as Lotus Notes, Microsoft Outlook, and Captaris™ RightFax™, must be the same on the source device and the target devices.
- On the target device, install only those connectors whose profiles you plan to select for publishing from the source device. The Administration console will report successful publishing for any connector profiles that are not installed on the target devices, but they will be ignored on the target device.
- Make sure that the Administration console is not running on the target devices. (If the Administration console is running, an error message will appear in the status column.)

Summary of the publishing process

Before publishing the profiles, the Publish function performs the following steps:

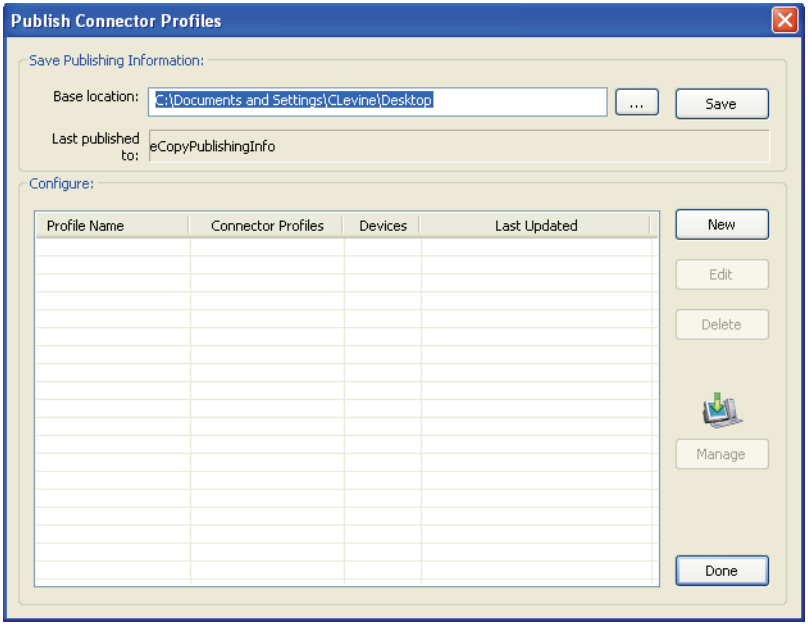
- Makes a copy of all the required files in the Base location specified in the Publish Connector Profiles window.
- Creates a folder named "eCopyPublishingInfo" under the Base location folder.
- Creates backup copies of current connector profiles on the target device, storing the copies in the <*installation_directory*>\ShareScanOPManager\BackupConnectorProfiles folder on the target device.

During publishing, the status for each device is updated. If an error message appears in the Status column for the device, double-click the error to retrieve details about it.

If a group of profiles includes a profile for a connector that is not supported on a target device, Publish ignores it. For example, assume that you created a group that includes profiles for the following connectors: Copy, Exchange, Quick Connect, Scan to eCopy Desktop, and Fax via Print. You want to publish this group to a ScanStation device and to an embedded device. The Publish function will ignore Fax via Print when it publishes the group of profiles to the embedded device.

To create a new group of profiles:

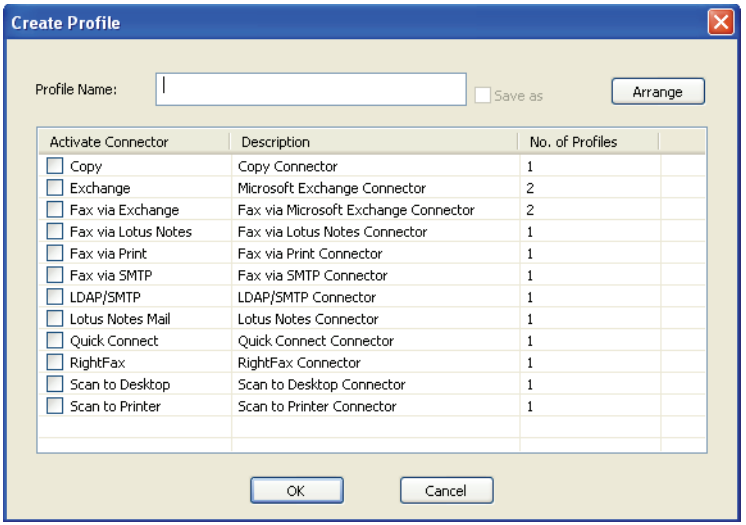
1 In the console tree, right-click **Devices** and then select **Publish connector profiles**. The **Publish Connector Profiles** window opens.



2 In the **Base location** field, specify where you want to save the publishing information.

3 Click **New**.

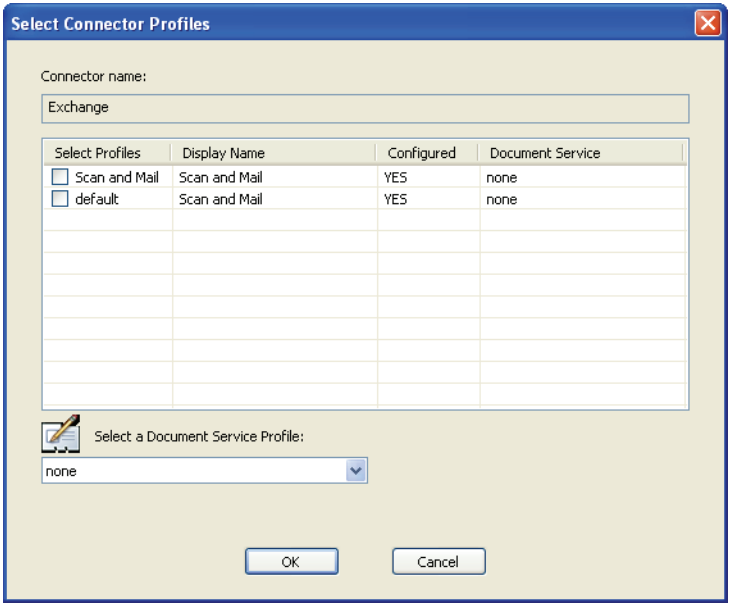
The **Create Profile** window opens.



4 In the **Profile Name** field, enter a name for the group of connector profiles.

5 In the **Activate Connector** column, select a connector for which you want to include one or more profiles.

The **Select Connector Profiles** window opens.



6 Select the connector profiles that you want to publish and then click **OK**.

The **Create Profile** window opens.

7 Select additional connector profiles that you want to publish. You can publish up to nine connector profiles to any device.

8 When you have finished selecting the connector profiles to include in the group, click **OK**.

The **Publish Connector Profiles** window lists the new profile. The table specifies the profile name and the number of connector profiles included in it.

> **Note:** Although Copy is not supported on ScanStation devices and Fax via Print is not supported on devices running ShareScan Embedded software, the Publish function does not keep you from selecting these connectors. The Publish function does not know what devices will use the group of profiles you are creating.

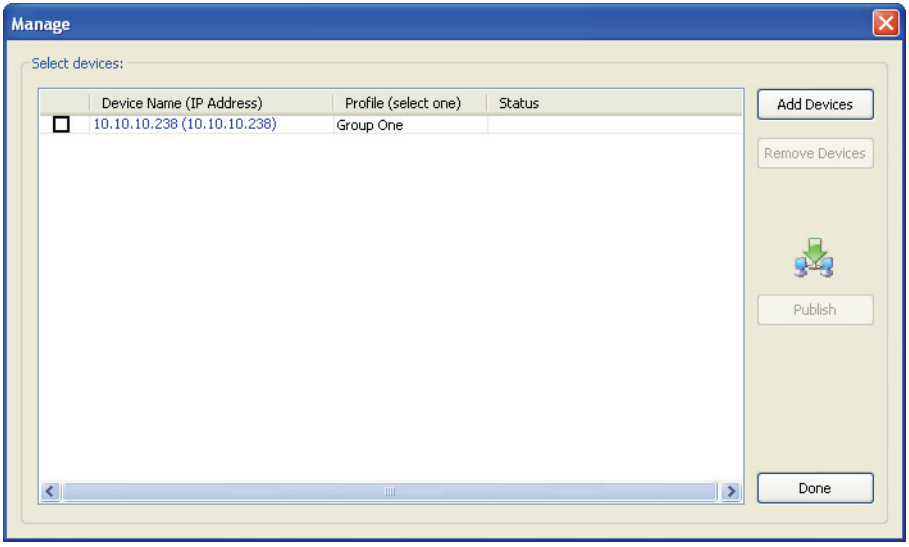
To add target devices:

1 In the console tree, right-click **Devices** and then select **Publish connector profiles**.

The **Publish Connector Profiles** window opens.

2 Click **Manage**.

The **Manage window** opens.

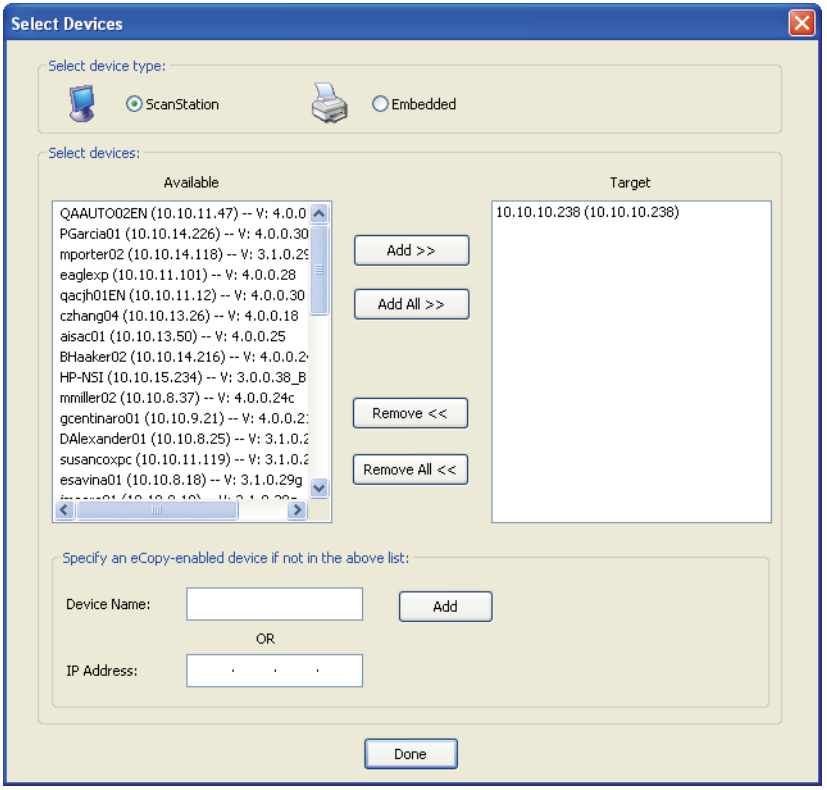


3 If the device that you want to add is not on the list, click **Add Devices**. The **Select Devices** window opens. Go to step 4.

If the device that you want to add is on the list, select its check box and then click **Done**.

4 In the **Select Devices** window, select the device type, ScanStation or Embedded.

If you select **ScanStation**, the list of available devices includes the available ScanStations. If you select **Embedded**, the list displays the available Services Managers.



If a device or Services Manager does not appear on the list, specify the device or Services Manager name or the IP address and then click **Add**.

5 In the list of available devices, select the target devices:

- **ScanStation devices:** Select each ScanStation that you want to publish the profile to and then click **Add**.

  The devices are listed in the **Target** area.

- **For Embedded devices:** Select the Services Manager name to view the devices that it supports. Select the check box next to the name to select all its devices, or select the check box next to each device that you want to publish the profile to. Then click **Add**.

  If acquisition of the device has been disabled using the Security Options feature for the Services Manager, ShareScan displays an error message prompting you to contact the administrator for the device. For information about setting security options, see page 121.

6 When you have selected all the target devices, click **Done**.

To publish a group of profiles:

1 In the console tree, right-click **Devices** and then click **Publish connector profiles**.

The **Publish Connector Profiles** window opens.

2 Click **Manage** and then select the check box next to each target device.

3 For each device, in the **Profile (select one)** column, select the group of profiles that you want to publish.

4 Click **Publish**.

The connector profiles in the group are published to the device.

To save profiles and publishing information:

1. In the console tree, right-click **Devices** and then click **Publish connector profiles**.

   The **Publish Connector Profiles** window opens.

2. Leave the specified Base location or select a new one.
3. Click **Save**.

   All current profiles and publishing information are saved in the eCopyPublishingInfo folder under the Base location folder.

To delete a group:

1. In the console tree, right-click **Devices** and then click **Publish connector profiles**.

   The **Publish Connector Profiles** window opens.

2. Select the group of profiles that you want to remove.
3. Click **Delete**.
4. Click **Yes** to delete the profile.

To edit a group:

1. In the console tree, right-click **Devices** and then click **Publish connector profiles**.

   The **Publish Connector Profiles** window opens.

2. Select the group of profiles that you want to modify.
3. Click **Edit**.

   The **Modify Device Profile** window opens.

4. Add or remove connector profiles.
5. Click **Arrange**.

   The **Arrange Profiles** window opens.

6. Use the **Move up** and **Move down** buttons to specify the order in which you want the connector profile buttons to appear at the device and then click **Save**.

   The **Modify Device Profile** window opens.

7. Click **OK**.

   The **Publish Connector Profiles** window opens.

8. Click **Save**.

   All current profiles and publishing information are saved in the eCopyPublishingInfo folder under the Base location folder.

To create a copy of a group:

Sometimes it is easier to copy and edit an existing group of connector profiles than to create a new group from scratch.

1. In the console tree, right-click **Devices** and then click **Publish connector profiles**.
   The **Publish Connector Profiles** window opens.
2. Select the group of profiles that you want to copy.
3. Click **Edit**.
   The **Modify Device Profile** window opens.
4. Enter a name for the new group, select **Save As**, and then click **OK**.
   A copy of the group of profiles is saved under the new name.

Note: You can edit the copied group of profiles before saving it to the Base location.

To use a backup copy of connector profiles on a target device:

1. Start the Administration console on the target device.
2. Import the backup copy from the BackupConnectorProfiles folder on the target device (see page 137).

To use published profiles on a different device:

1. Start the Administration console on the target device on which you want to use the published profiles.
2. Import the profiles and publishing information from the eCopyPublishingInfo folder, which is under the Base location folder on the source device (see page 137).

Reference: Managing the ScanStation Client

The eCopy™ ScanStation™ Client runs on an MFP or scanner connected to a ScanStation.

You manage and configure the Client from the Administration console. Developers can use the console to select a test file for use with the SDK simulator.

Note: The Client for the ShareScan Embedded product is contained in a JAR file that you install on an MFP. You manage and configure the embedded Client using the appropriate service for the MFP, as described in the "Installing the JAR file" section in the installation guide provided with the embedded products. You do not manage the embedded Client from the Administration console.

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- Configuring the Client to use a TWAIN driver's own interface 275
- Starting and stopping the Client 276
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Selecting a different TWAIN driver

You select a TWAIN driver when you license a TWAIN scanner. You may need to select a different driver if you change the device or if you selected the wrong driver.

Note: The TWAIN driver that you select must be from the same manufacturer as the device.

To select a different TWAIN driver:

1. In the console tree, select **Devices** > <*device_name*> > **Manage**.
2. Select the **Status** tab.

   If you are using a Send to eCopy key, a Send to eCopy tab appears in **Device properties** pane.
3. Select **Enable TWAIN**.
4. The Browse button next to the **Driver Name** field becomes active.
5. Click the Browse button (...).

   The **Select Source** window opens.
6. Select the driver name and then click **Select**.

   The Client is now configured to use the new driver.

Configuring the Client to use a TWAIN driver's own interface

Depending on the TWAIN driver you select for use on the ScanStation Client, you may be able to configure the Client to use the TWAIN driver's own interface.

When you select this option, the Administration console interface changes; the Scanner tab for the device hides the scanner settings and the Use TWAIN user interface for settings option appears on the device's Status tab.

The Client interface changes in the following ways:

- The icons for the scanner settings in the lower left corner of the main Client screen will not appear.
- When a user at the device presses a connector button, the Client will display the TWAIN driver's own interface. After the user specifies the scanner settings and initiates the scanning process, the driver transfers the scanned images to the scan preview screen on the Client.
- When a user at the device presses the Scanner Settings button on the scan preview screen, the Settings tab will include the Image and Output tabs, but not the Page and Scanner tabs.

To configure the Client to use the TWAIN driver's own interface:

1. In the console tree, select **Devices** > <*device_name*> > **Manage**.
2. Select the **Status** tab.

   If you are using a Send to eCopy key, a Send to eCopy tab appears in the **Device properties** pane.
3. If you are using a Send to eCopy key that supports the use of both Send to eCopy and a TWAIN driver, select **Enable TWAIN**.
4. Select **Use TWAIN user interface for settings**.
5. Click **Save**.

Starting and stopping the Client

You can start the Client at the device or from the Administration console. If the Windows Task Manager is open when you start the Client, the Client will automatically close it.

Note: On a ShareScan system running on Windows Vista, you cannot start the Client from the Administration console.

To start the Client at the device:

1. Select **Start** > **Programs** > **eCopy Applications**.
2. Select **ScanStation Client**.

To quit the Client at the device:

By default, there are two ways to quit the Client at the device:

- If the Client is configured to use a hard keyboard, press ESC or ALT+F4 and then press the Yes button in the Exit window.
- If the Client is configured to use the on-screen (soft) keyboard, press ABOUT and then press the Exit icon.

You can configure the Client so that users must enter a password in order to quit the Client.

To configure and start the Client from the Administration console:

1. In the console tree, select **Devices** > <*device_name*> > **Manage**.

   The **Manage ScanStation Client** pane displays Client information and enables you to configure settings for the Client.

2. Select the **Status** tab.

   The information in the **Driver Name** field is based on the product key.

3. To keep unauthorized users from quitting the Client, select the **Settings** tab, enter a password in the **Password (Exit)** field, and then click **Save**.

4 Select the **ScanStation Logon** tab.

- Make sure that this tab contains logon credentials. The Client will not start if the credentials fields are blank.
- Select the **Use preceding credentials to start/stop the ScanStation Client** option.

5 Select the **Status** tab.

- Under **Client Status**, click **Start**.

  The Client opens on the touch screen. A button appears for each connector that you have configured for the device.

To stop the Client from the Administration console:

1 In the console tree, select **Devices** > <*device_name*> > **Manage**.

2 Under **Client Status**, click **Stop**.

To stop and then restart the Client from the Administration console:

1 In the console tree, select **Devices** > <*device_name*> > **Manage**.

2 Under **Client Status**, click **Restart**.

Selecting the ScanStation keyboard

You can configure the ScanStation Client to use a hard keyboard or an on-screen (soft) keyboard. There are several situations where you may want to enable the on-screen keyboard:

- You are using the product on an old ScanStation (black box).
- You need to use a keyboard language other than English, French, Italian, German, or Spanish. The client supports on-screen keyboards in Danish, Dutch, English (UK), English (US), Finnish, French, German, Italian, Norwegian, Portuguese, Spanish, and Swedish.
- You do not want to leave a hard keyboard in a public, unsecured area.

Important! By default, the system keys are secured and the taskbar is hidden. This ensures that users at the device cannot shut down the ScanStation, invoke the Start menu, or access other applications. You cannot disable this option. However, even though the system keys are secured, authorized users can quit the Client (see page 276).
The system key combination of CTRL+ALT+DEL opens the Windows Security window. If the Client is running under an account with local administrator privileges, the Task Manager button is disabled. If the Client is running under an account with user privileges, the Task Manager button is not disabled. However, if the user at the device clicks the button, the Task Manager window opens, and then closes immediately.

To select the keyboard:

1. In the console tree, select **Devices** > <*device_name*> > **Manage**.
   The **Device properties** pane appears.
2. Select the **Settings** tab.
3. Under **Keyboard**, select the hard keyboard or the soft keyboard option.
4. Click **Save**.
5. Select the **Status** tab.
6. Restart the Client.

Configuring logon settings

You can configure the ScanStation to automatically start the Client and log on as a specified user whenever the ScanStation is started. If you do not do this, you must start the Client manually each time you start the ScanStation.

When you are remotely connected to the Administration console, you may find it useful to restart the ScanStation. You can do this using the Reboot ScanStation button on the ScanStation Logon tab. The target ScanStation will display a warning that includes a 10 second waiting period.

To configure logon settings:

1. In the console tree, select **Devices** > <*device_name*> > **Manage**.
   The **Device properties** pane appears.
2. Select the **ScanStation Logon** tab.
3. Under **Automatic Logon to Windows**, specify the settings (see Table 61).
4. Click **Save**.

TABLE 61. Client: ScanStation logon settings

Option	Description
Log on automatically at ScanStation startup with the following credentials	At ScanStation startup, or when the device is restarted, automatically logs on to Windows using the specified user name, password, and domain.
Use preceding credentials to start/stop the ScanStation Client	Logs on using the specified user name, password, and domain. This option is required if you want to start, stop, or restart the Client from the Administration console.
Automatically start ScanStation Client at startup (all users)	Starts the Client as soon as a user logs on to the ScanStation or after an automatic logon. If you are only using the specified logon information to start and stop the Client, users can log on to the ScanStation using credentials other than the ones specified on this tab.

Enabling logging

You may need to enable Client logging when you are working with Technical Support to troubleshoot a problem.

To enable logging:

1. In the console tree, select **Devices** > <*device_name*> > **Manage**.
   The **Device properties** pane appears.
2. Select the **Settings** tab.
3. Under **Advanced**, select **Logging**.

   Note: The Test file field enables developers working with the SDK to select a file that can be used with the simulator. This functionality is only available in development mode. For information about developing connector applications, refer to the documentation provided with the eCopy ShareScan Connector SDK.

4. Click **Save**.

Reference: Using eCopy Connectors

After you configure connector profiles and activate them on a device, you use a profile by selecting its button on the Client screen. The "look and feel" of the Client depends on whether you are using a device with an embedded Client or a device connected to an eCopy ScanStation™.

This section uses ScanStation screens to illustrate procedures; if you are not using a ScanStation, your screens will look different. The screens use the default icons included with ShareScan.

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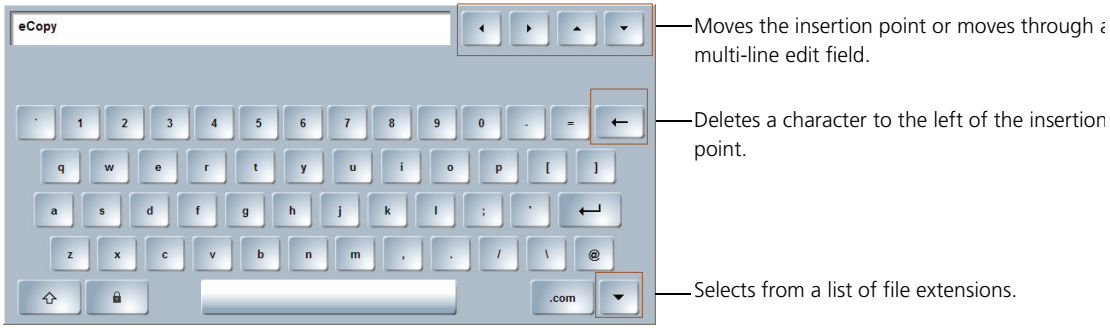
Using the on-screen keyboard

The sequence of some procedures depends on whether you are using a hard keyboard or the on-screen keyboard for text input.

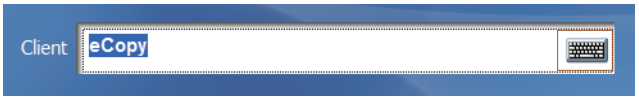
Notes: ScanStation devices support a hard keyboard and the on-screen keyboard; for information about specifying the keyboard to be used on a ScanStation, see the "Configuring the keyboard" section" in the documentation provided with your ScanStation.
Some devices running ShareScan Embedded software support a hard keyboard and the on-screen keyboard; in these cases, ShareScan detects the hard keyboard automatically. You do not have to specify which keyboard to use on the device.
Some devices running ShareScan Embedded software support only the on-screen keyboard.

The following screen illustrates an on-screen (soft) keyboard.


eCopy
Moves the insertion point or moves through a multi-line edit field.
Deletes a character to the left of the insertion point.
Selects from a list of file extensions.
.com

On-screen keyboard

On a device with an embedded Client, the keyboard appears when you press a button or field that requires text input. On a ScanStation, the keyboard appears when you press the keyboard icon.



When a connector prompts you to enter information in more than one field, the on-screen keyboard includes the Next Field button. You use this button to move from field to field as you enter the requested information.

On a device with an embedded Client, you use the Add to List button to select multiple items and the Show List button to see all previously selected list items.

Quick reference to using an eCopy Connector

This section provides you with a general procedure for using an eCopy Connector to scan and send a document. For information about functions unique to each connector, refer to the connector-specific information in this guide.

This general procedure includes information about performing functions that are common to many connectors, such as specifying document and scanner settings. The actual steps that your users will perform will depend on the connector profile they use. For example, if you configure a connector profile to use the Express function (see page 152), users will not need to perform many of the steps included in the procedure in this section.

This procedure uses the eCopy Connector for Microsoft Exchange as an example. The connector profile uses the following configuration settings:

- Enable Session Logon
- Send from personal account
- Add messages to Sent Items folder
- Allow user to select recipients
- Allow user to add recipients to Cc list
- Search Global Address List
- Search Outlook Contacts
- Enable user to manually enter addresses when sending e-mail
- Default subject line and note

The process described in this section assumes that you are using the hard keyboard, which is available on a ScanStation and on some devices running ShareScan Embedded software.

This section uses ScanStation screens to illustrate procedures; if you are not using a ScanStation, your screens will look different. The screens use the default icons included with ShareScan.

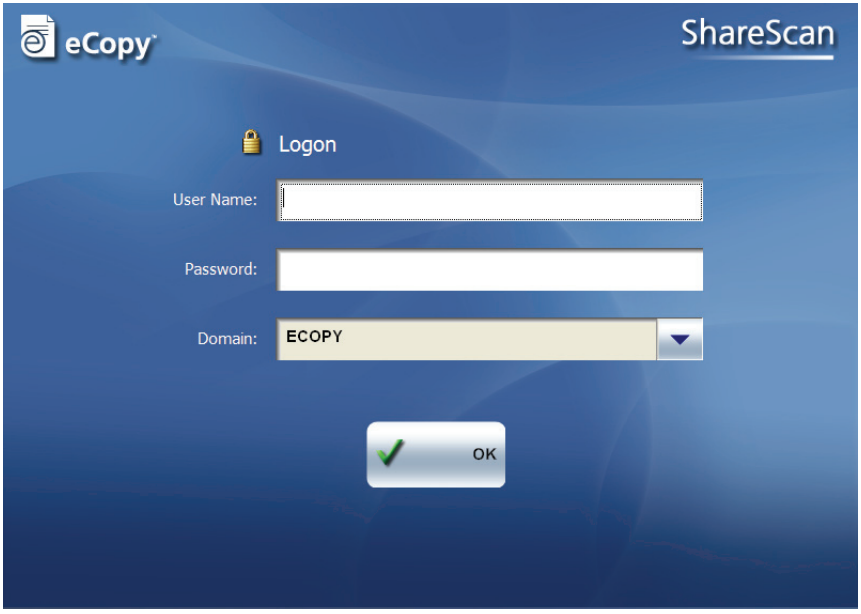
To use an eCopy Connector:

1. Place your document in the feeder or on the glass.
2. Access the Client.

   On a MEAP-enabled Canon device with an embedded Client, press the black arrow on the device's touch panel to cycle through the embedded applications until the main Client screen appears.

   On a ScanStation, the touch screen always displays the main Client screen.

   When Session Logon is enabled, the **Logon** screen is the first Client screen.



3 If your system is configured to use the Session Logon feature, enter your user credentials on the **Logon** screen.

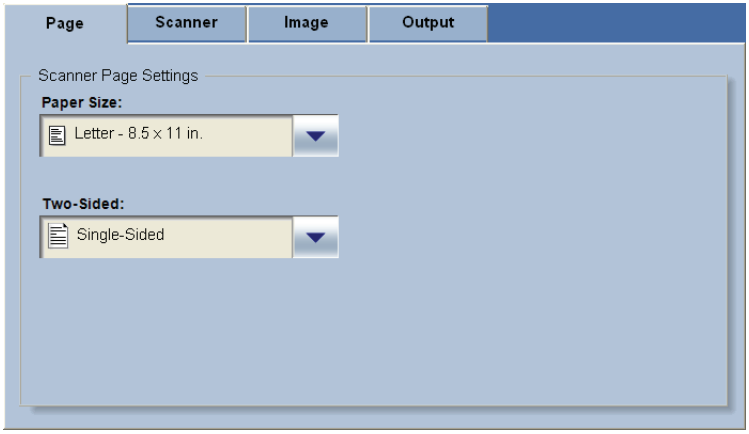
If you enabled **Search while typing** on the **Session Logon** tab, the connector will search for matching address list entries after each character you enter in the **User Name** field. Select your name from the list, enter your password and domain, and then press **OK**.

The main Client screen appears. When Session Logon is enabled, the main screen includes a **Log Out** button.

Note: If you configured the ScanStation Client to use the TWAIN driver's own user interface (see page 275), the default scanner settings will not appear.

4 On the main Client screen, review the default scanner settings.

5 Press **Scanner Settings** to change any of the settings, such as the paper size, color depth, brightness, and resolution (see page 170) and then press **OK**.



Note: If you configured the ScanStation Client to use the TWAIN driver's own interface, the Page and Scanner tabs will not appear. You specify the settings through the TWAIN driver's interface when it appears.

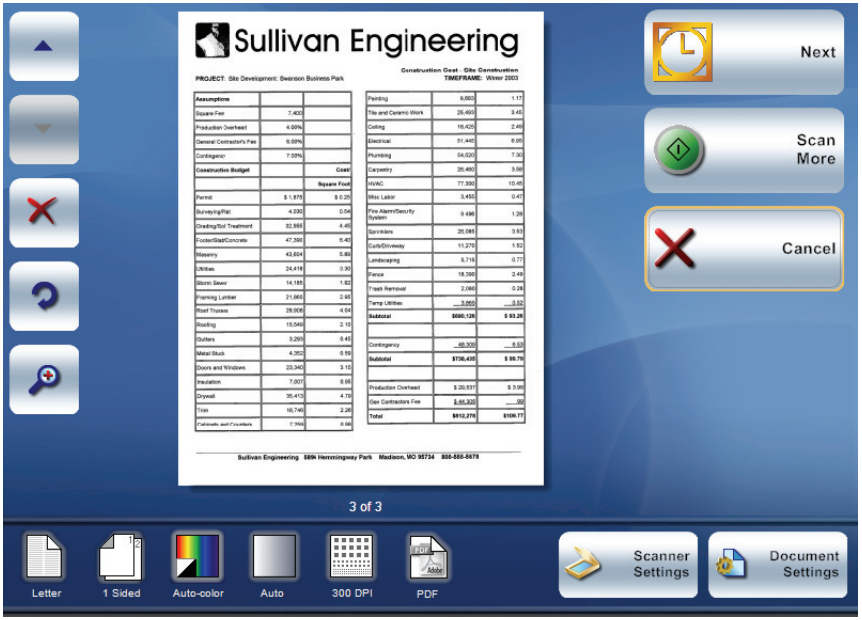
6 After changing the scanner settings, press the button associated with the connector, such as Scan and Mail, to start scanning the document.

The Client displays the "Scanning. Please wait..." message in the lower left corner of the screen.

Note: If you configured the ScanStation Client to use the TWAIN driver's own interface, the Client displays the interface. Specify the settings that you want to use and then press the TWAIN driver's "Scan" button. The driver scans the pages and transfers them to the Client.

7 If prompted, enter any pre-scan information that the connector requests. (You can configure some connectors to request information before they scan the document.)

When the connector finishes scanning the document, it displays the last page of the scanned document on the scan preview screen.



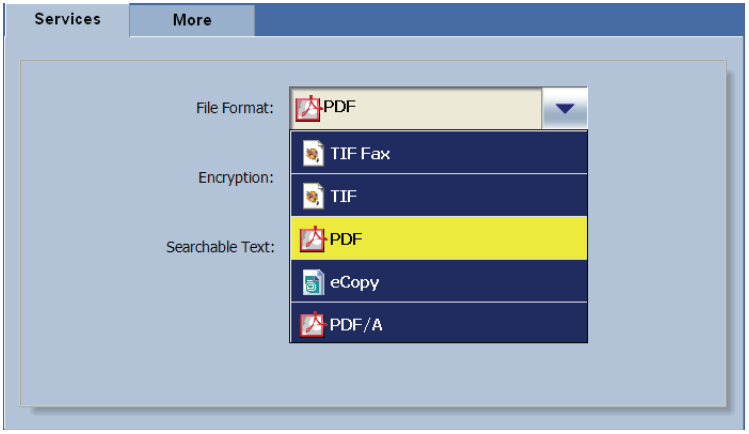
8 Review the scanned documents. The buttons on the left side of the scan preview screen enable you to view, delete, rotate, and change the magnification of the images.

9 If necessary, scan additional pages or re-scan any of the original pages by placing the pages in the feeder or on the glass and then pressing **Scan More**. (If you are using the TWAIN driver's own interface, press **Insert**.)

When you scan additional pages, the Client inserts them after the page that is currently displayed on the scan preview screen. For example, if the Client is displaying page 5 of an 8-page document and you scan 2 more pages, the Client inserts the new pages after page 5.

10 Press **Document Settings** to review the settings, such as the file format (see page 166).

The settings are grouped on two tabs, **Services** and **More**. The **More** tab appears only if you enable the **Batching** or **Blank Page Removal** settings.



11 Change any user-modifiable settings and then press **OK**.

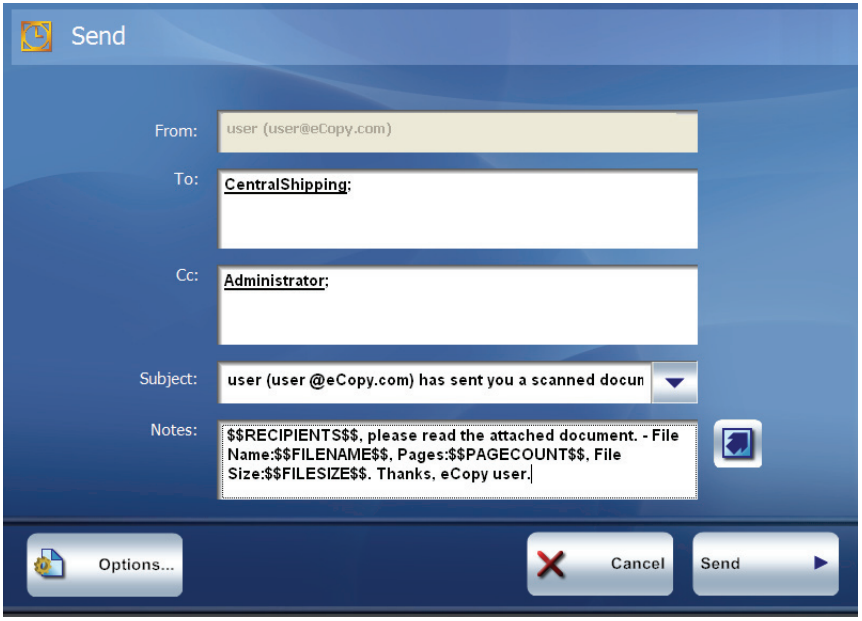
12 When you have scanned all the pages in the document and are satisfied with the settings, press the delivery button (**Send** or **Next**, depending on the Client).

13 If prompted, enter any additional information requested by the connector. For example, if **Session Logon** is not enabled, and if the connector profile is configured to send scanned documents from a personal e-mail account, the system will prompt you to log on.

Note: If the profile is configured to send scanned documents from a generic ShareScan User account; you will not need to log on.

14 If the **Send** screen appears, select or enter the recipients of the scanned document and, optionally, specify subject line and notes information. (The fields depend on the connector [see Table 62].)

> **Note:** If the profile is configured to use the Express or Send to self features, the Send screen will not appear.

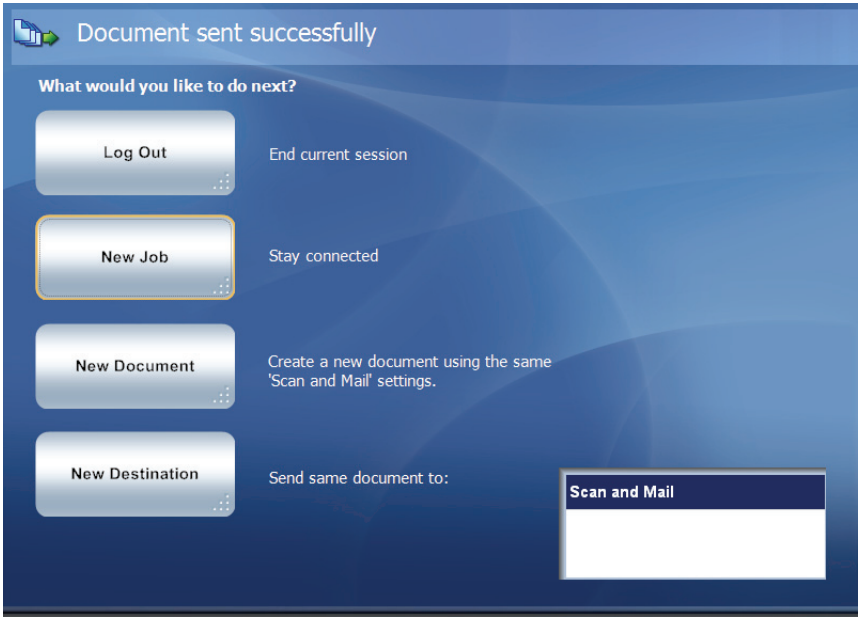


If the connector profile allows you to manually enter recipient addresses, it may also be configured to add those addresses to a local address book (see page 164). The next time you want to send a document to those recipients, you will be able to select them from the local address book. You will not have to manually enter the addresses again.

If the Search while typing option is enabled and the profile is configured to search the Global Address List and the Outlook Contacts folder for recipient names, as well as to allow you to manually enter e-mail addresses, the connector displays the first address in the address list or Contacts folder that matches the characters that you type. For example, assume that you want to enter **client1@address.com** in the **To** field. When you type **c**, the connector will display **CentralShipping**, if it is in the Global Address List or in the Contacts folder. Continue entering the entire Internet e-mail address.

15 When you are ready to send the document, press the delivery button (**Send** or **Next**, depending on the Client).

After the connector sends the document, a screen similar to the following screen appears. This particular screen appears when **Session Logon** is enabled.



16 Select one of the post-scanning options (see Table 63):

TABLE 62. Client: Send screen settings

Field/Option	Applicable connectors	Description
From	E-mail, Fax via Lotus Notes, and RightFax	If this field is blank, enter your e-mail address in the field.
To	E-mail	The primary recipients.
Address Book Search	Fax via Microsoft Exchange and Fax via SMTP	If the recipient is already in your address book or Exchange contacts (Fax via Microsoft Exchange only) you can use the Search while typing option. Depending on how the search is configured by your administrator, search on the first or last name, or the email address of the recipient. When you select a recipient, the fax number is displayed in the Fax Number field.
Number or Fax Number	Fax	The recipient's fax number (required). For Fax via Microsoft Exchange or Fax via SMTP, if the recipient is not already in your address book, you can add the recipientby clicking the Save to Address book button.
Search	RightFax	Specifies the user ID of a recipient to search for in your RightFax phone book. When you move to the next field, the connector will fill in the recipient and fax number information from the RightFax phone book.
CC:	E-mail	One or more recipients who are not the primary recipients.
First Name	Fax via Lotus Notes	The recipient's first name (optional for Fax via Microsoft Exchange and Fax via SMTP, required for Fax via Lotus Notes).
Last Name	Fax via Lotus Notes	The recipient's last name (optional).
Recipient	RightFax	The name of a recipient who is not in the RightFax phone book.
Subject	E-mail and fax, but not RightFax	The subject to include in the subject line (optional).
Notes	E-mail, Fax via Microsoft Exchange, Fax via SMTP, and RightFax	Notes to include in the message body (optional). Useful if you attach a cover sheet (RightFax).

TABLE 62. Client: Send screen settings (continued)

Field/Option	Applicable connectors	Description
Message Options	Exchange (e-mail)	Message settings that are also available through Microsoft Outlook and OWA (Outlook Web Access): Importance, Sensitivity, Delivery Receipt, Read Receipt. The availability of each setting depends on the configuration of the connector profile.
Attach Cover Page or Use Cover Sheet	Fax	Specifies whether to attach a cover page to the fax. RightFax: If you select Yes and your RightFax account is not configured to use a cover sheet, the connector ignores your selection. The connector profile can be configured to hide the cover page buttons so that the user does not see them on the Send screen.
Details	RightFax	Displays information about the specified recipient. If the user exists in the RightFax phone book, you cannot change any of the information about the user. Phone book entries can only be changed on the RightFax server. To add a new recipient to the RightFax phone book, enter the name in the Recipient field and then press Details. Specify a user ID and add other information about the user. Under Save Recipient, select Yes and then press OK.
Send As	RightFax	If you have appropriate rights on the RightFax server to send faxes from another user's account, press Send As. Select the RightFax user ID of the other user and then press OK.

TABLE 63. Client: Post-scanning options

Option	Description
Log Out	Displays the Logon screen. Appears only when Session Logon is enabled.
New Job	Displays the main Client screen. Appears only when Session Logon is enabled.
Done	Displays the main Client screen. Appears only Session Logon is not enabled.
New Document	Displays the scan preview screen so that you can scan a new document using the current settings. Place the new document in the feeder or on the glass and then press Scan More (if you are using the Client's interface). Press Insert (if you are using the TWAIN driver's own interface). (If you are using a device with an embedded Client, you can press the device's Start button to scan the new document.
New Destination	Enables you to send the scanned document to another connector. Select the target connector in the list and then press New Destination. The Client opens the target connector and displays the scanned document on the scan preview screen. Press Next and then follow the prompts provided by the target connector.

Copy

Copy is available for some devices running ShareScan Embedded software. If you try to activate a Copy profile on an unsupported device, the system will display an error message.

Before using a connector, review the quick reference section (see page 283). That section includes information about performing functions that are common to many connectors, such as specifying scanner and document settings.

To use Copy:

1. Place your document in the feeder or on the glass.
2. Access the Client.
3. On the main Client screen, press **Copy**.
4. Specify the settings (see Table 64). The available settings depend on the device.
5. When you have specified the settings, press **Copy**.
   The device copies your document and the **Copy Status** window opens.
6. Press **Done**.

TABLE 64. Copy settings

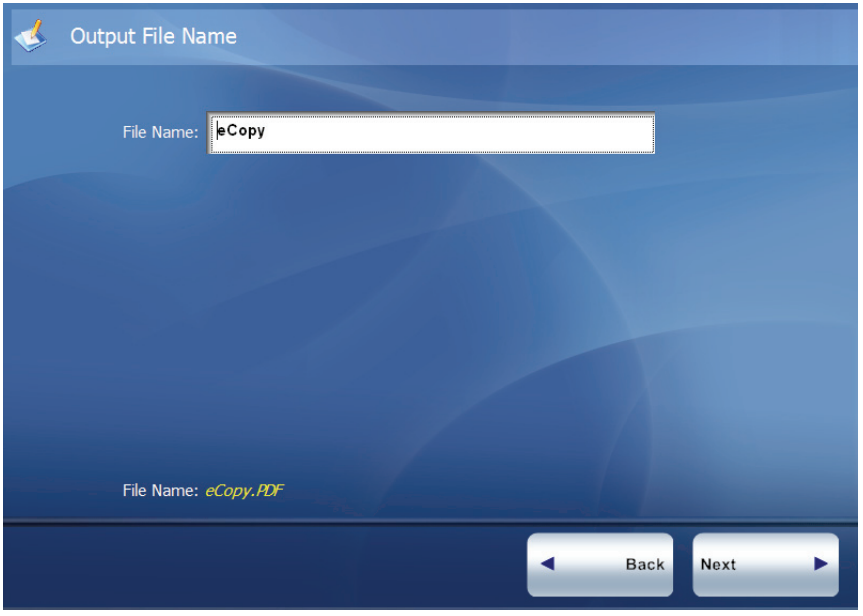
Setting	Description
Paper Tray	The paper tray to use.
Color Mode	The color mode. Available only on color devices.
Image Mode	The image mode that best corresponds to the document that you are copying.
Brightness	Move the slider or use the + and - buttons to adjust the brightness.
Number of Copies	The number of copies.
Finisher	Enables you to specify the finishing mode.
Two-sided	Enables you to specify two-sided mode.
Image Quality Adjustment	Enables you to remove the background color from the document and to prevent bleed-thru.

eCopy Connector for Microsoft Exchange

Before using a connector, review the quick reference section (see page 283). That section includes information about performing functions that are common to many connectors, such as specifying scanner and document settings.

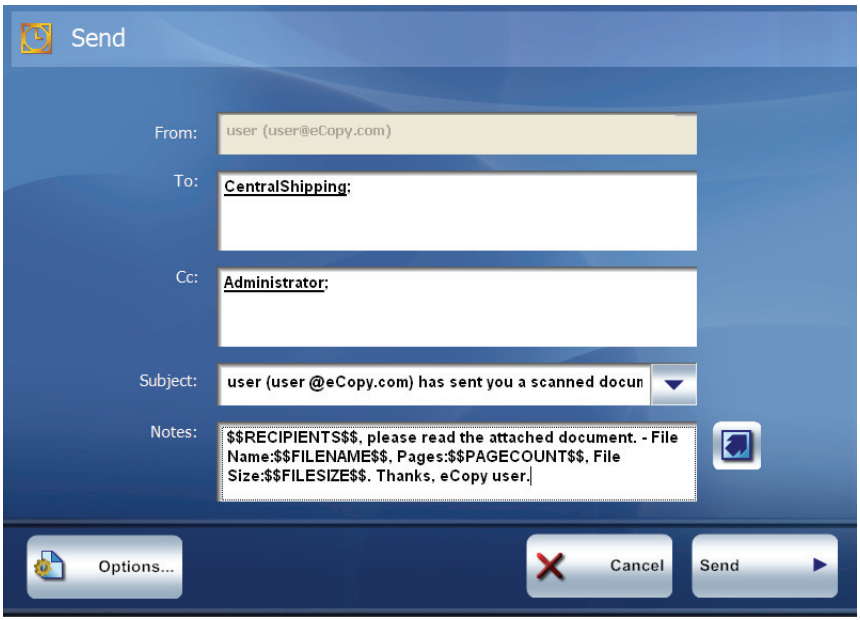
To use eCopy Connector for Microsoft Exchange:

1. Place your document in the feeder or on the glass and then access the Client.
2. If prompted, enter your logon information.
3. On the main Client screen, press **Scanner Settings** to change any user-modifiable settings. After changing the settings, press **OK**.
4. Press the button associated with the connector to start scanning the document.
5. When the connector finishes scanning the document, review the scanned pages on the scan preview screen. If necessary, scan additional pages or re-scan any of the original pages.
6. Press **Document Settings** to review and change any user-modifiable settings. After changing the settings, press **OK**.
7. When you have scanned all the pages in the document and are satisfied with the settings, press the delivery button (**Send** or **Next**, depending on the Client).
8. If the **Output File Name** screen appears, leave the default file name or enter a new name. The number of screens, and the buttons you press to continue to subsequent screens, depends on the Client.



9 If prompted, enter your user name and password.

10 If the **Send** screen appears, select or enter the recipients of the scanned document, and, optionally, specify subject line and notes information (see Table 62).



11 If the **Options** button appears at the bottom of the screen, you can configure one or more of the following message options: **Importance**, **Sensitivity**, **Delivery Receipt**, **Read Receipt**.

12 Press the delivery button (**Send** or **Next**, depending on the Client).

13 Select one of the post-scanning options (see Table 63).

eCopy Connector for Fax via Microsoft Exchange

Before using a connector, review the quick reference section (see page 283). That section includes information about performing functions that are common to many connectors, such as specifying scanner and document settings.

To use eCopy Connector for Fax via Microsoft Exchange:

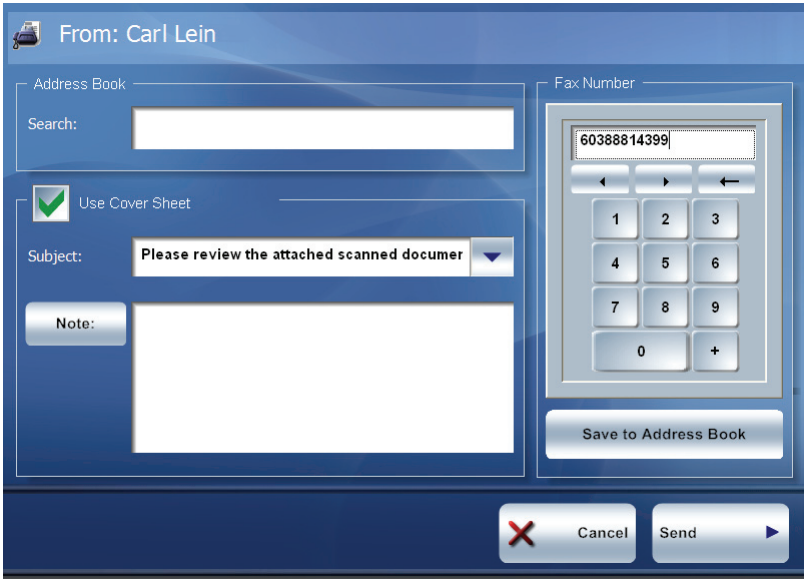
1. Place your document in the feeder or on the glass and then access the Client.
2. If prompted, enter your logon information.
3. On the main Client screen, press **Scanner Settings** to change any user-modifiable settings. After changing the settings, press **OK**.
4. Press the button associated with the connector to start scanning the document.
5. When the connector finishes scanning the document, review the scanned pages on the scan preview screen. If necessary, scan additional pages or re-scan any of the original pages.
6. Press **Document Settings** to review or change any user-modifiable settings. After changing the settings, press **OK**.
7. When you have scanned all the pages in the document and are satisfied with the settings, press the delivery button (**Send** or **Next**, depending on the Client).
8. If prompted, enter your user name and password.

9 If the **Send** screen appears, specify the settings (see Table 62).

- If the recipient is in your local address book or Outlook contacts, you can search by fax number, first name, or last name, depending on how your connector is configured. When you select a name in the, **Search** field the fax number appears in the **Fax Number** field.
- If the recipient is not in your address book or Outlook contacts, enter the fax number in the **Fax Number** field. You can add the information to your local Address book by clicking the **Save to Address Book** button and entering the recipient's information in the **New Address Book Entry** window. This also adds the recipient's information to the cover sheet.

10 Press the delivery button (**Send** or **Next**, depending on the Client)..

Note: If you do not want to add the recipient to your address book, enter the fax number in the Fax Number field and press the delivery button (Send or Next, depending on the Client). When the Cover Page Information screen appears, select Send without saving, enter the recipient's name, and press OK.



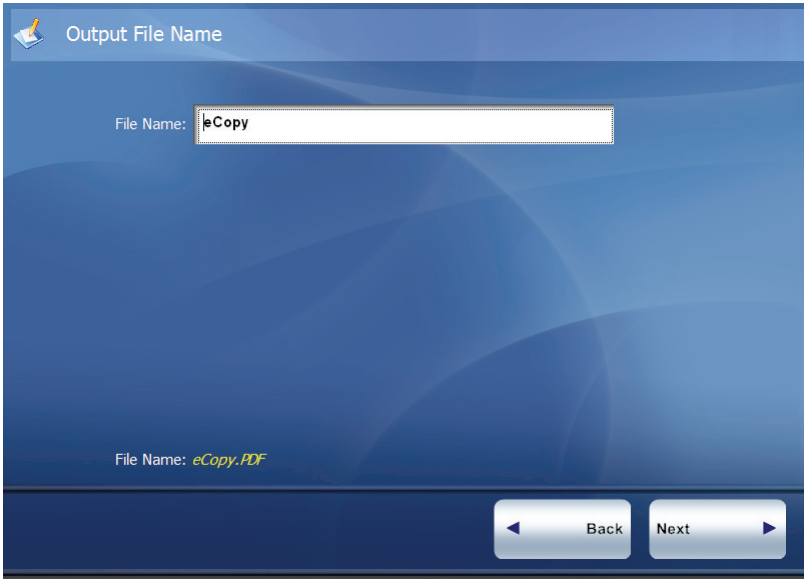
11 Select one of the post-scanning options (see Table 63).

eCopy Connector for Lotus Notes Mail

Before using a connector, review the quick reference section (see page 283). That section includes information about performing functions that are common to many connectors, such as specifying scanner and document settings.

To use eCopy Connector for Lotus Notes Mail:

1. Place your document in the feeder or on the glass and then access the Client.
2. If prompted, enter your logon information.
3. On the main Client screen, press **Scanner Settings** to change any user-modifiable settings. After changing the settings, press **OK**.
4. Press the button associated with the connector to start scanning the document.
5. When the connector finishes scanning the document, review the scanned pages on the scan preview screen. If necessary, scan additional pages or re-scan any of the original pages.
6. Press **Document Settings** to review or change any user-modifiable settings. After changing the settings, press **OK**.
7. When you have scanned all the pages in the document and are satisfied with the settings, press the delivery button (**Send** or **Next**, depending on the Client).
8. If the **Output File Name** screen appears, leave the default file name or enter a new name. The number of screens, and the buttons you press to continue to subsequent screens, depends on the Client.



9 If prompted, enter your user name and password.

10 If the **Send** screen appears, specify the settings (see Table 62).

11 Press the delivery button (**Send** or **Next**, depending on the Client).

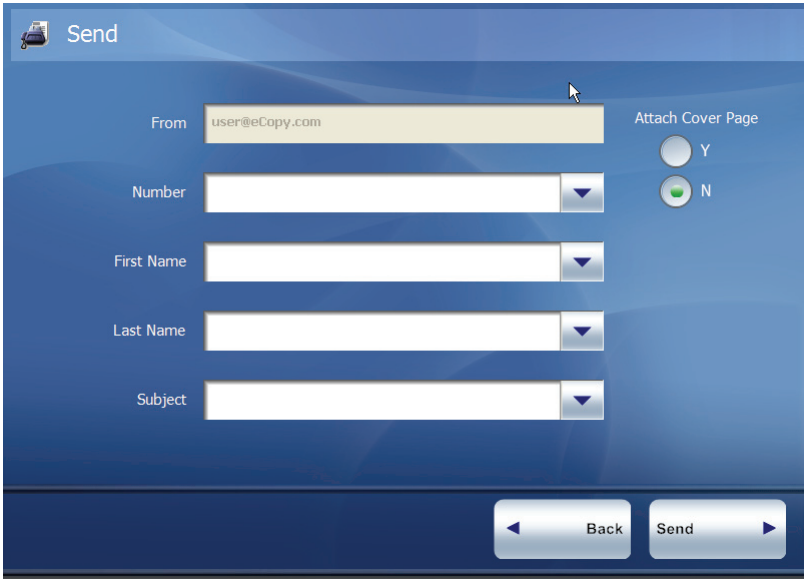
12 Select one of the post-scanning options (see Table 63).

eCopy Connector for Fax via Lotus Notes

Before using a connector, review the quick reference section (see page 283). That section includes information about performing functions that are common to many connectors, such as specifying scanner and document settings.

To use eCopy Connector for Fax via Lotus Notes:

1. Place your document in the feeder or on the glass and then access the Client.
2. If prompted, enter your logon information.
3. On the main Client screen, press **Scanner Settings** to change any user-modifiable settings. After changing the settings, press **OK**.
4. Press the button associated with the connector to start scanning the document.
5. When the connector finishes scanning the document, review the scanned pages on the scan preview screen. If necessary, scan additional pages or re-scan any of the original pages.
6. Press **Document Settings** to review or change any user-modifiable settings. After changing the settings, press **OK**.
7. When you have scanned all the pages in the document and are satisfied with the settings, press the delivery button (**Send** or **Next**, depending on the Client).
8. If prompted, enter your user name and password.
9. If the **Send** screen appears, specify the settings (see Table 62). If a fax number, first name, or last name is in a local fax address book, entering information in any of those three fields may fill in the information in the other two fields.



10 Press the delivery button (**Send** or **Next**, depending on the Client).

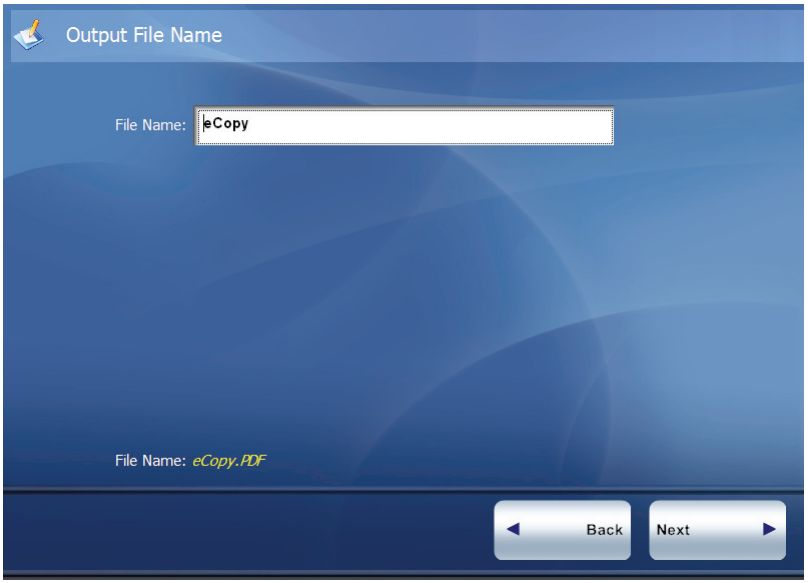
11 Select one of the post-scanning options (see Table 63).

eCopy Connector for SMTP using LDAP

Before using a connector, review the quick reference section (see page 283). That section includes information about performing functions that are common to many connectors, such as specifying scanner and document settings.

To use eCopy Connector for SMTP using LDAP:

1. Place your document in the feeder or on the glass and then access the Client.
2. If prompted, enter your logon information.
3. On the main Client screen, press **Scanner Settings** to change any user-modifiable settings. After changing the settings, press **OK**.
4. Press the button associated with the connector to start scanning the document.
5. When the connector finishes scanning the document, review the scanned pages on the scan preview screen. If necessary, scan additional pages or re-scan any of the original pages.
6. Press **Document Settings** to review or change any user-modifiable settings. After changing the settings, press **OK**.
7. When you have scanned all the pages in the document and are satisfied with the settings, press the delivery button (**Send** or **Next**, depending on the Client).
8. If the **Output File Name** screen appears, leave the default file name or enter a new name. The number of screens, and the buttons you press to continue to subsequent screens, depends on the Client you are using.



9 If prompted, enter your user name and password.

10 If the **Send** screen appears, select or enter the recipients of the scanned documents, and, optionally, specify subject line and notes information (see Table 62).

11 Press the delivery button (**Send** or **Next**, depending on the Client).

12 Select one of the post-scanning options (see Table 63).

eCopy Connector for Fax via SMTP

Before using a connector, review the quick reference section (see page 283). That section includes information about performing functions that are common to many connectors, such as specifying scanner and document settings.

To use eCopy Connector for Fax via SMTP:

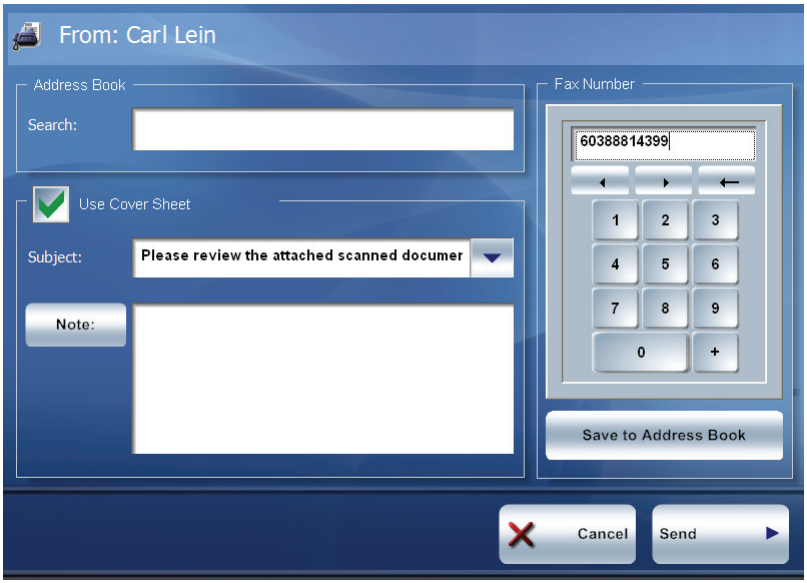
1. Place your document in the feeder or on the glass and then access the Client.
2. If prompted, enter your logon information.
3. On the main Client screen, press **Scanner Settings** to change any user-modifiable settings. After changing the settings, press **OK**.
4. Press the button associated with the connector to start scanning the document.
5. When the connector finishes scanning the document, review the scanned pages on the scan preview screen. If necessary, scan additional pages or re-scan any of the original pages.
6. Press **Document Settings** to review or change any user-modifiable settings. After changing the settings, press **OK**.
7. When you have scanned all the pages in the document and are satisfied with the settings, press the delivery button (**Send** or **Next**, depending on the Client).
8. If prompted, enter your user name and password.

9 If the **Send** screen appears, specify the settings (see Table 62).

- If the recipient is in your local address book, you can search by fax number, first name, or last name, depending on how your connector is configured. When you select a name in the, **Search** field the fax number appears in the **Fax Number** field.
- If the recipient is not in your address book, enter the fax number in the **Fax Number** field. You can add the information to your local Address book by clicking the **Save to Address Book** button and entering the recipient's information in the **New Address Book Entry** window. This also adds the recipient's information to the cover sheet.

10 Press the delivery button (**Send** or **Next**, depending on the Client).

Note: If you do not want to add the recipient to your address book, enter the fax number in the Fax Number field and press the delivery button (Send or Next, depending on the Client). When the Cover Page Information screen appears, select Send without saving, enter the recipient's name, and press OK.



11 Select one of the post-scanning options (see Table 63).

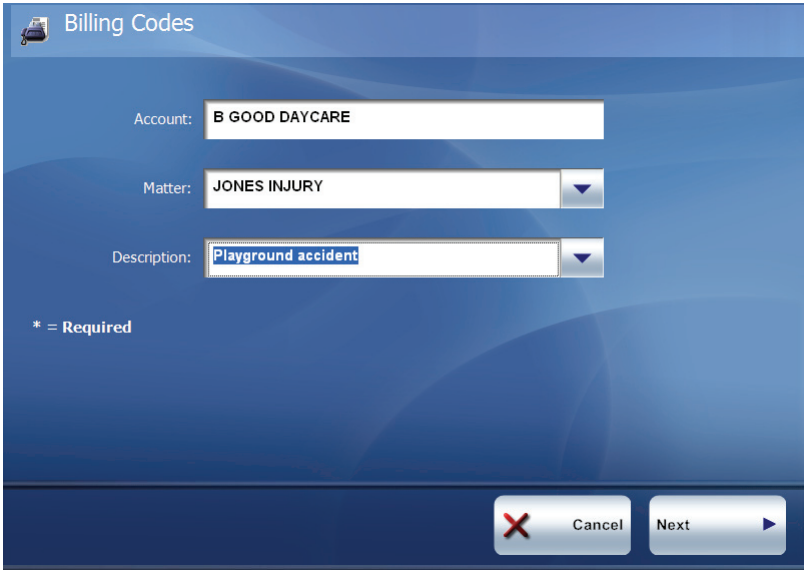
eCopy Connector for Captaris™ RightFax™

Before using a connector, review the quick reference section (see page 283). That section includes information about performing functions that are common to many connectors, such as specifying scanner and document settings.

To use eCopy Connector for Captaris™ RightFax™:

1. Place your document in the feeder or on the glass and then access the Client.
2. If prompted, enter your logon information.
3. On the main Client screen, press **Scanner Settings** to change any user-modifiable settings. After changing the settings, press **OK**.
4. Press the button associated with the connector to start scanning the document.
5. When the connector finishes scanning the document, review the scanned pages on the scan preview screen. If necessary, scan additional pages or re-scan any of the original pages.
6. Press **Document Settings** to review or change any user-modifiable settings. After changing the settings, press **OK**.
7. When you have scanned all the pages in the document and are satisfied with the settings, press the delivery button (**Send** or **Next**, depending on the Client).
8. If prompted, enter your user name and password.

   If you configured RightFax to capture billing information, the **Billing Codes** screen appears.

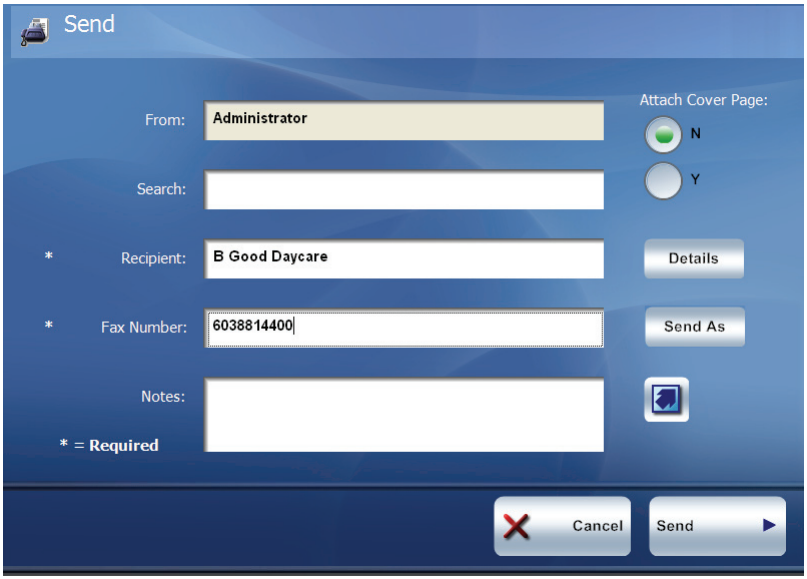


9 Enter the billing code information by selecting a billing code from the drop-down list associated with each field. You must complete all required fields.

The code you select for the first field determines the codes that are available for selection in the other fields. The third field is the description associated with the second field.

> **Note:** If your company uses the Cost Recovery Service to populate the billing code fields, your ability to change the contents may be restricted.

10 If the **Send** screen appears, specify the settings (see Table 62).



11 Press the delivery button (**Send** or **Next**, depending on the Client).

12 Select one of the post-scanning options (see Table 63).

eCopy Connector for Fax via Print

Before using a connector, review the quick reference section (see page 283). That section includes information about performing functions that are common to many connectors, such as specifying scanner and document settings.

To use eCopy Connector for Fax via Print:

1. Place your document in the feeder or on the glass and then access the Client.
2. If prompted, enter your logon information.
3. On the main Client screen, press **Scanner Settings** to change any user-modifiable settings. After changing the settings, press **OK**.
4. Press the button associated with the connector to start scanning the document.
5. When the connector finishes scanning the document, review the scanned pages on the scan preview screen. If necessary, scan additional pages or re-scan any of the original pages.
6. Press **Document Settings** to review or change any user-modifiable settings. After changing the settings, press **OK**.
7. When you have scanned all the pages in the document and are satisfied with the settings, press the delivery button (**Send** or **Next**, depending on the Client).
8. If prompted, enter your user name and password.
9. Complete the information requested by the fax driver and press its "Send" or "Exit" key.
10. Press the delivery button (**Print**).
11. Select one of the post-scanning options (see Table 63).

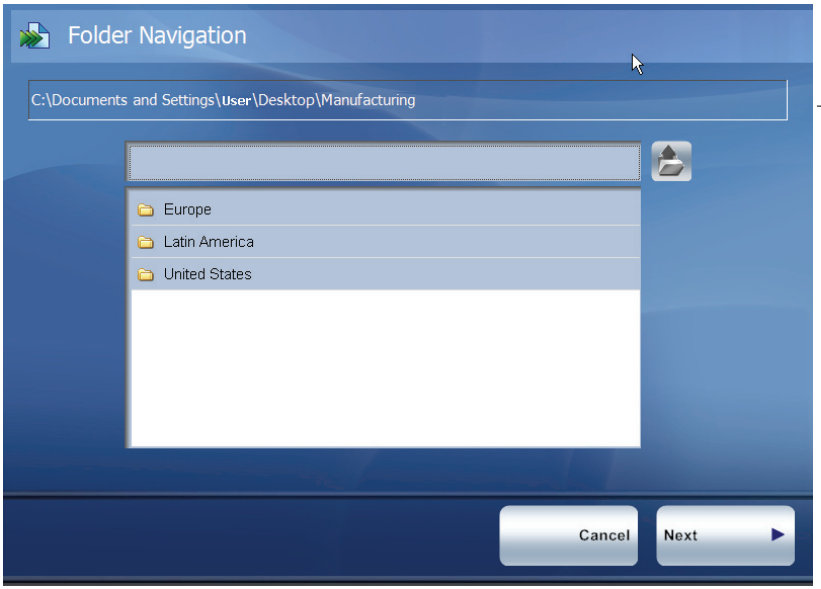
Quick Connect

Before using a connector, review the quick reference section (see page 283). That section includes information about performing functions that are common to many connectors, such as specifying scanner and document settings.

To use Quick Connect:

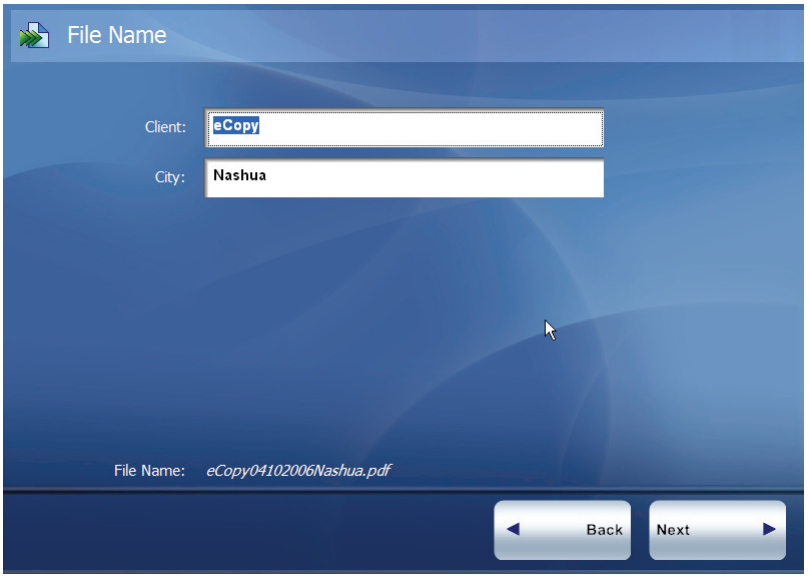
1. Place your document in the feeder or on the glass and then access the Client.
2. If prompted, enter your logon information.
3. On the main Client screen, press **Scanner Settings** to change any user-modifiable settings. After changing the settings, press **OK**.
4. Press the button associated with the connector to start scanning the document.
5. When the connector finishes scanning the document, review the scanned pages on the scan preview screen. If necessary, scan additional pages or re-scan any of the original pages.
6. Press **Document Settings** to review or change any user-modifiable settings. After changing the settings, press **OK**.
7. When you have scanned all the pages in the document and are satisfied with the settings, press the delivery button (**Send** or **Next**, depending on the Client).
8. If prompted, enter your user name and password.

9 If the **Folder Navigation** screen appears, select the target subfolder in the destination folder.

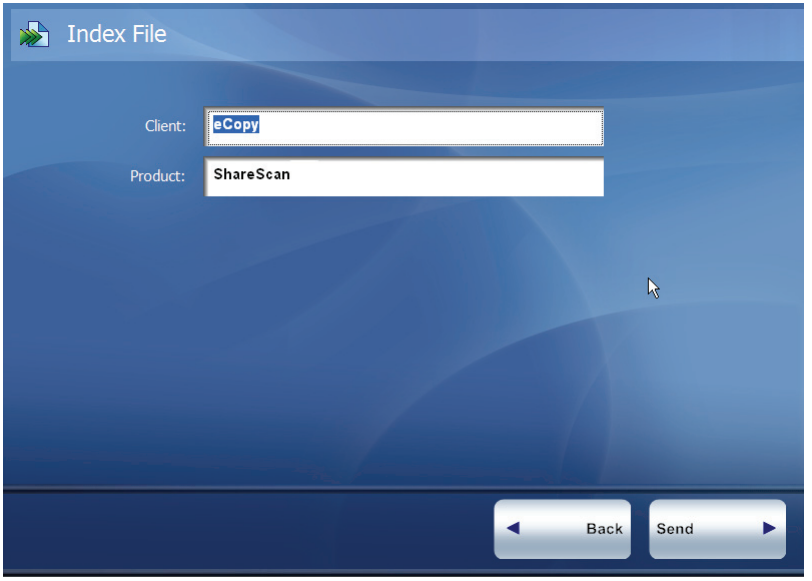


10 Continue to select subfolders in the list until the complete path appears in the path field and then press **Next**.

11 If the **File Name** screen appears, specify the information in the fields and then press **Next**.



12 If the **Index File** screen appears, specify the information in the index fields.



13 Press the delivery button (**Send** or **Next**, depending on the Client).

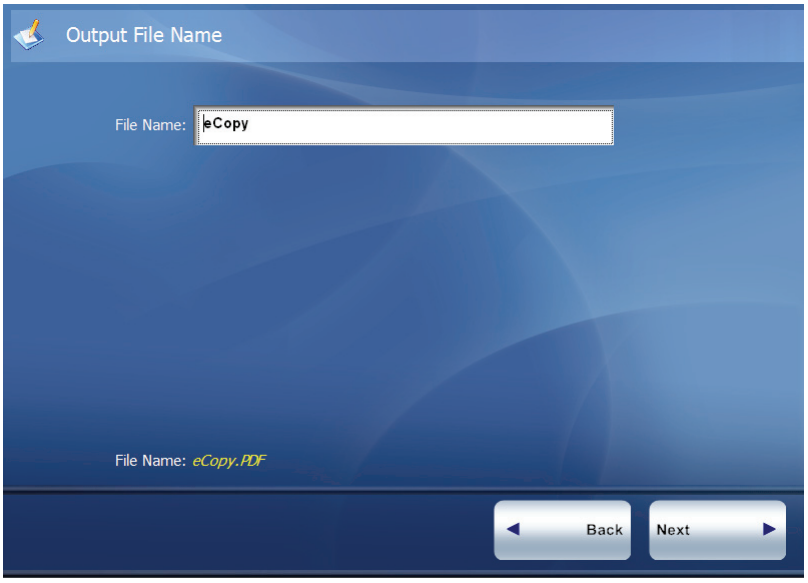
14 Select one of the post-scanning options (see Table 63).

Scan to eCopy Desktop

Before using a connector, review the quick reference section (see page 283). That section includes information about performing functions that are common to many connectors, such as specifying scanner and document settings.

To use Scan to eCopy Desktop:

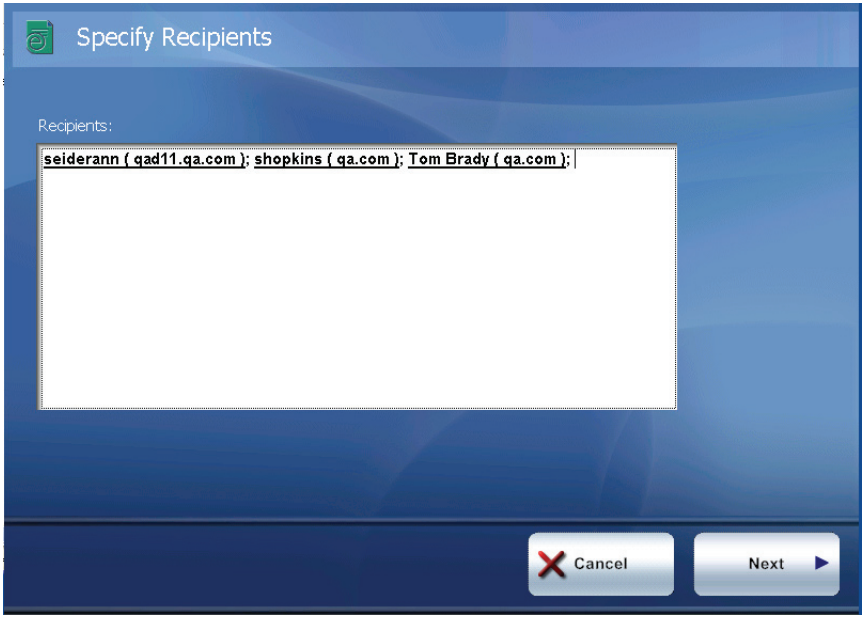
1. Place your document in the feeder or on the glass and then access the Client.
2. If prompted, enter your logon information.
3. On the main Client screen, press **Scanner Settings** to change any user-modifiable settings. After changing the settings, press **OK**.
4. Press the button associated with the connector to start scanning the document.
5. When the connector finishes scanning the document, review the scanned pages on the scan preview screen. If necessary, scan additional pages or re-scan any of the original pages.
6. If the **Output File Name** screen appears, leave the default file name or enter a new name. The number of screens, and the buttons you press to continue to subsequent screens, depends on the client you are using.



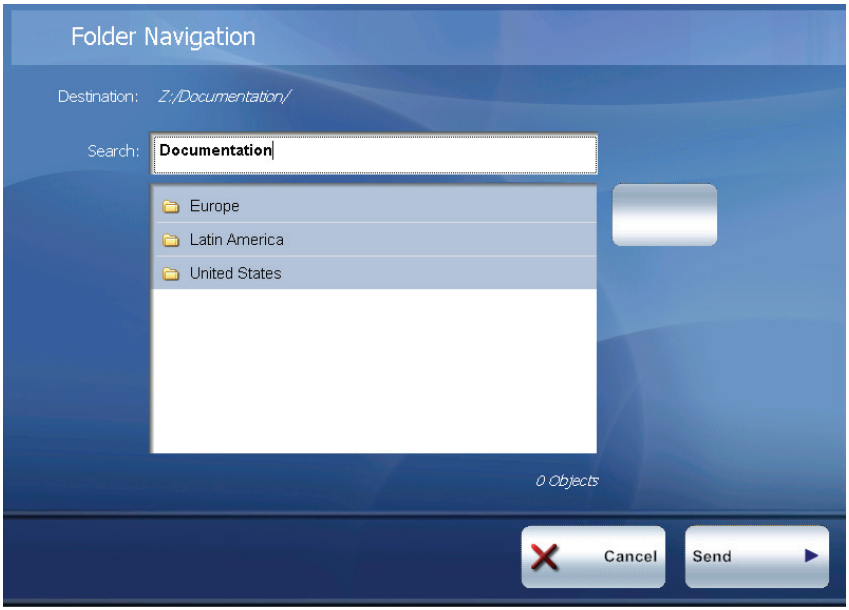
7 If prompted, enter your Scan to eCopy Desktop logon information.

If the profile is configured to allow a single recipient, the scanned document is sent directly to your scan inbox.

8 If the profile is configured to allow multiple recipients, the **Specify Recipients** screen appears. Enter the first characters of the name of a registered user. When the complete name appears, press ENTER.



9 If the profile is configured to allow you to send the document to a storage folder, the **Folder Navigation** screen appears. Select the storage destination for the scanned document.



10 Press the delivery button (**Send** or **Next**, depending on the client).

11 Select one of the post-scanning options (see Table 63).

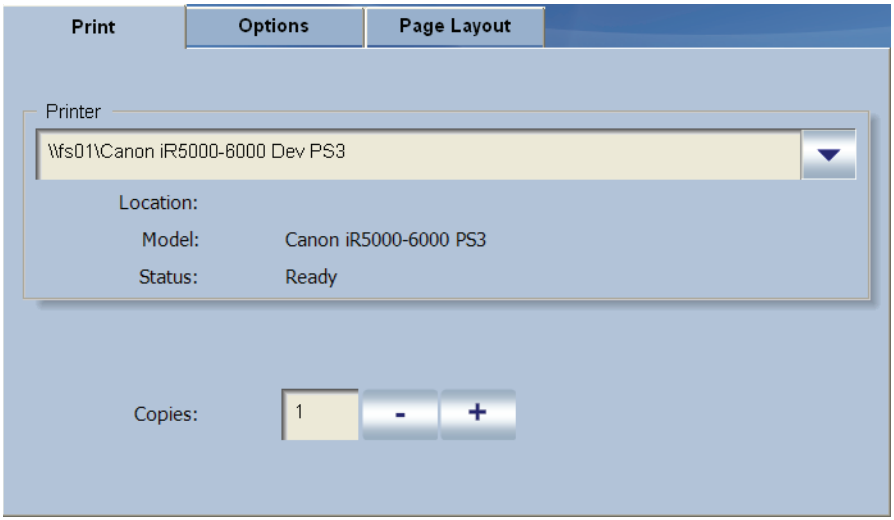
Scan to Printer

Before using a connector, review the quick reference section (see page 283). That section includes information about performing functions that are common to many connectors, such as specifying scanner and document settings.

To use Scan to Printer:

1. Place your document in the feeder or on the glass and then access the Client.
2. If prompted, enter your logon information.
3. On the main Client screen, press **Scanner Settings** to change any user-modifiable settings. After changing the settings, press **OK**.
4. Press the button associated with the connector to start scanning the document.
5. When the connector finishes scanning the document, review the scanned pages on the scan preview screen. If necessary, scan additional pages or re-scan any of the original pages.
6. Press **Document Settings** to review or change any user-modifiable settings. After changing the settings, press **OK**.
7. When you have scanned all the pages in the document and are satisfied with the settings, press the delivery button (**Send** or **Next**, depending on the Client).

8 Select a printer and then specify the settings (see Table 65).
The available options depend on the selected printer.



9 When you are ready to send the document, press the delivery button (**Print**).

10 Select one of the post-scanning options (see Table 63).

TABLE 65. Scan to Printer: Printing and page layout options

Option	Description
Collate	Prints the copies in the proper binding order. Applies only when printing multiple copies of a multi-page original.
Duplex	Specifies whether to print single-sided or double-sided copies.
Paper Tray	Available paper trays.
Resolution	Available output resolutions.
Pages per sheet	The number of reduced-size originals that you want to print on the same sheet of paper.
Page numbers	Prints the page number beneath each image on the printed sheet. Applies only if you set the Pages per sheet option to more than one.
Page scaling	Page scaling options: ■ Actual Size: Maintains the size of the original; portions of the image that lie outside the printable area will not be printed. ■ Fit to Paper: Reduces the size of the image so that it fits within the printable area.

Reference: Installation environment

eCopy™ ShareScan® is a client/server-based application. It is designed to work with the Canon® Multifunctional Embedded Application Platform (MEAP™)Ricoh SDK/J architecture. ShareScan can support from 1 to 25 MEAP-enabled imageRUNNER SDK/J-enabled digital copiers per PC, depending on the capacity of the PC and the expected type of scanning workload. The Services Manager on an eCopy ScanStation™ supports a single digital copier or scanner.

This section describes the hardware, software, and network requirements for setting up the Services Manager and eCopy-enabled devices. Please complete the worksheets in this chapter before your scheduled installation and make sure that all devices are configured as required.

In this chapter

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- Hardware configuration guidelines 323
- Services Manager PC worksheet 324
- Device worksheet 326
- Firewall and switch worksheet 327
- Network infrastructure worksheet 329
- DNS considerations 330
- Novell support 330
- Device setup for MEAP-enabled devices 333

Network environment

ShareScan uses TCP ports for communication between the Client and the server application on the PC running the Services Manager. Several ports must be available (not blocked) in order to enable this communication (see page 327). Internal network traffic between the client and server is minimal.

You can use multicast UDP to automatically discover and connect to other Services Managers for remote administration. Multicast UDP also provides a fast way to discover eCopy-enabled devices. If you choose not to open the multicast UDP ports, you can connect manually to other Services Managers and discover devices using Simple Network Management Protocol (SNMP).

ShareScan runs on domain-based networks and in workgroup environments. In a domain environment, the system supports both static and dynamic IP addresses. The Domain Name System (DNS) is used to resolve host names in a domain environment. In a workgroup environment, all eCopy-enabled devices and Services Managers must have static IP addresses.

eCopy-enabled devices and the Services Manager can be on different subnets or virtual local area networks (VLANs) provided that the devices can communicate with the Services Manager using an IP address.

ShareScan does not support network attached storage (NAS) devices.

A ScanStation is connected to a device on the network. If the device is not on the same network segment as the ScanStation, there can be performance issues.

For information about Novell support, see page 331.

Hardware configuration guidelines

To help you gauge hardware requirements, there are three typical usage scenarios and the hardware requirements for each scenario (see Table 66).

TABLE 66. Hardware configuration guidelines

Scenario type	Description	Hardware requirements
General office use	A typical office environment where multiple multifunction peripherals (MFPs) support a combination of printing, copying, and scanning.	Equivalent to an Intel® Pentium® 4 (P4) 2.4 GHz machine with Hyper-Threading enabled and with 1 GB of RAM (recommended). The minimum RAM requirement is 512 MB.
Light production scanning	An environment where multiple devices scan simultaneously for continuous periods with occasional creation of searchable text. Requires CPU-intensive OCR processing by the Services Manager.	Dual processor P4 3.2 GHz machines with Hyper-Threading enabled and with at least 1 GB of RAM.
Heavy production scanning	Same as light production scanning except that searchable text is created for all scanned pages. Includes file batching.	Dual processor Xeon machines with at least 1 GB of RAM.

For the most effective throughput, consider the following information:

- Memory is the most important element in the achievement of efficient throughput. If the Services Manager PC is supporting more than 3 devices, it must have at least 512 MB of RAM.
- While a fast IDE drive (7200 RPM) is acceptable, a fast SCSI drive (15,000 RPM) improves throughput. NTFS is the required drive format.
- Desktop or workstation P4 or Xeon class machines with more memory are more effective than traditional server-class machines, such as Intel Pentium III class machines with high I/O throughput.

For the maximum number of devices supported for each hardware configuration and usage scenario, refer to the eCopy Web site. Your company's network configurations, the amount of simultaneous scanning, and the use of the Create Searchable Text option can affect system performance, which in turn can affect the supported number of devices.

Services Manager PC worksheet

Each site requires at least one network PC to run the Services Manager; each Services Manager can support multiple eCopy-enabled devices.

You should not install the Services Manager on a PC that is also running Microsoft Exchange server.

Copy and complete the following worksheet for each Services Manager you plan to install.

TABLE 67. Services Manager PC worksheet

Item	Notes	Services Manager PC	Example
CPU (type/speed)	Review the hardware configuration guidelines (see page 323).		P4/2.4 GHz
RAM			512 MB
Operating system	Windows 2000 Professional Windows 2000 Server Windows XP Professional Windows 2003 Server Microsoft Windows Vista. ShareScan Embedded supports Windows Vista Enterprise and Windows Vista Business. ShareScan for ScanStation runs on Windows Vista Business. Use the latest service packs and critical updates.		Windows XP
Drive size	Minimum 40 GB.		40 GB
Drive type and format	IDE or SCSI drive. NTFS format is required.		IDE/NTFS
Network interface card	10/100 NIC is required.		10/100
TCP/IP installed	Required.		Yes
Client for Microsoft Networks installed	Required.		Yes
Novell® client installed	Required only for Novell authentication of scan inboxes on a Novell server.		No
IP address (or DHCP)	Static IP address is required in workgroup configurations.		DHCP

TABLE 67. Services Manager PC worksheet (continued)

Item	Notes	Services Manager PC	Example
DNS server address	Required only if you are using DNS (see page 330).		192.168.1.113
Domain or workgroup	Runs in either environment.		domain
Domain name	Enter a name, if applicable.		ecopy
Network login name and password	Name used during normal operation (must be a local administrator). Have password available during installation.		sharescan
Local firewall	It is recommended that you disable firewalls on this PC (see page 325).		Closed
Local security policy	Log on locally rights must be assigned to all "Domain Users".		Yes

Managing firewalls

If you choose to enable a firewall, make sure the required ports are open for communication between the Services Manager and the eCopy-enabled devices.

In the Windows Firewall program, the firewall is on by default. On the Exceptions tab, you must add the following programs and port:

- ShareScanOPManager.exe
- ShareScanOPAgent.exe
- ShareScanOPClient.exe
- MMC.exe
- InboxAgent.exe
- SQLServer.exe (if you are using the Internet Address Book)
- UDP port 1434 (if you are using SQL Express)

Device worksheet

Copy and complete the worksheet below for each eCopy-enabled device that you plan to use with ShareScan. For information about obtaining or modifying the current MEAP-enabled device settings, see page 333.

TABLE 68. Device worksheet

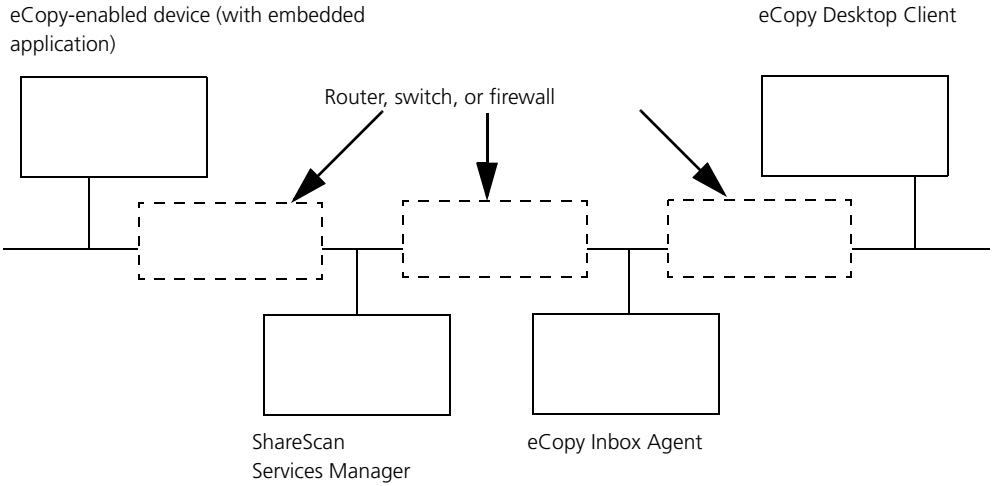
	Notes	Device	Example
Model	eCopy-enabled device.		iR 5020 Aficio2060
Location	Physical location of the device.		1-B32
Language			English
IP address (or DHCP)	Domain-based networks: eCopy recommends that you use static IP addresses. Workgroups: You must use static IP addresses.		10.10.10.68
Gateway address	Leave blank unless required by other applications.		<blank>
Primary DNS server	Domain-based networks: Not required. However, if you do not specify a DNS server, the Services Manager PC must have a static IP address. Workgroups: Leave this field blank.		10.10.10.10
Secondary DNS server	Leave blank.		<blank>
Host name	A unique name for the device that must not exceed 60 characters.		eCopyClient1-B32
Domain name	Enter a name, if applicable.		ecopy

Important! If you must uninstall the ShareScan JAR file from the MEAP device, contact Technical Support for assistance. The Canon license allows only a single installation of the JAR file.

Firewall and switch worksheet

Certain TCP ports must be open for communication between the devices on the network. You can open the required ports (on switches, routers, or firewalls) between specific devices; you do not need to open a required port to *all* devices on the network.

9100 is the main port used for communication between the Services Manager and an eCopy-enabled device. You can change the port number through the Administration console. If you change the port number, make the appropriate changes to your device settings.



Copy and complete the worksheet for each router, switch, firewall, or multi-homed PC that could affect communication.

TABLE 69. Firewall and switch worksheet

Item	Description	Firewall or other device	Example
Manufacturer			Cisco
Model			
Location			2-C22
9030, 9100	Must be open for communication between the Services Manager and eCopy-enabled devices. You can open the required ports between specific devices.		Open
8899, 9988 on multicast IP address 239.254.5.6[a]	Optional, for encrypted UDP communication between the Services Manager and eCopy-enabled devices.		Open
8888, 9999 on multicast IP address 239.254.5.6	Required, if you are using the eCopy Inbox Agent with Scan to eCopy Desktop. Optional, for unencrypted UDP communication between eCopy Inbox Agent, Services Manager, and eCopy Desktop clients.		Open
9200 - 9250	Used internally on PCs where the Services Manager is running. No special configuration is required.		Default
9010, 9101	Used for communication between the Administration console and the eCopy Agent service.		
7125	Used internally on PCs where the Services Manager is running.		

[a] 239.254.5.6 is an administratively scoped Class D IP address. It is used so that the packets are contained within the network. The multicast source relies on multicast-enabled routers to forward the packets.

Network infrastructure worksheet

Multiple domains and multiple workgroups are supported only if the Services Manager and all eCopy-enabled devices are configured to communicate with one other via TCP or UDP, without any port filtering or blocking.

Depending on the topology of the network, degradation in performance can occur when devices span multiple domains. ShareScan supports child domains provided that the devices and the Services Manager can communicate using an IP address. When devices cross domains, the system checks to see whether the device can resolve the IP address by name. If it cannot resolve the address, the device communicates using the IP address of the Services Manager.

TABLE 70. Network infrastructure worksheet

Item	Notes	Network	Example
Workgroup or domain-based network?			Domain
Devices span single or multiple domains?	eCopy recommends a single domain for best performance.		Single domain
Devices span single or multiple workgroups?	eCopy recommends a single workgroup for best performance.		Not applicable
Microsoft Active Directory installed?	Required on domain-based networks to support remote access to the Services Manager.		Yes
Devices on different subnets or VLANs?	eCopy-enabled devices and the Services Manager can be on different subnets or virtual LANs (VLANs), provided that the devices can communicate with the Services Manager using an IP address.		Yes
Router configured to pass packets between subnets or VLANs?	Required when devices span multiple subnets or VLANs.		Yes

DNS considerations

The Services Manager must be able to resolve the names of associated devices, whether through a Domain Name Service (DNS) server on the local network or through the HOSTS file on the Services Manager PC.

DNS should only be enabled on an eCopy-enabled device when there is a DNS server on the local network.

Using a DNS server on the local network

Make sure the DNS server on the local network automatically registers the host names and IP addresses of all devices on the local network. Older versions of operating systems and DNS servers do not do this automatically.

You can use the ping <*name*> command to see if a device is registered.

Note: When you assign an IP address to an eCopy-enabled device, it can take a while for the device to appear in the DNS server's local table. During this time ShareScan may not function correctly. If you are experiencing problems, refresh the DNS server or manually add the devices to the local table.

Configuring the HOSTS file

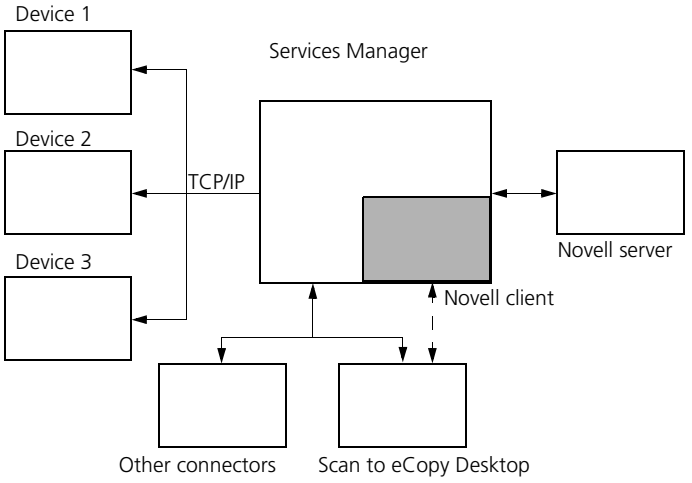
If you do not have a DNS server on the local network, add the IP addresses and host names to the HOSTS file in the \Windows\System32\Drivers\Etc directory on the Services Manager PC, as in the following example:

```
# This is a sample HOSTS file used by Microsoft TCP/IP for Windows.
# This file contains the mappings of IP addresses to host names. Each
# entry should be kept on an individual line. The IP address should
# be placed in the first column followed by the corresponding host name.
# The IP address and the host name should be separated by at least one
# space.
# For example:
#      102.54.94.97     rhino.acme.com          # source server
#       38.25.63.10     x.acme.com              # x client host
127.0.0.1  localhost
10.10.10.99  EnabledDevice
```

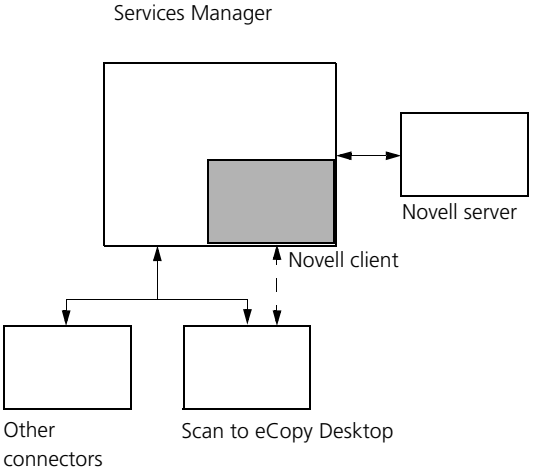
Novell support

On Novell networks, ShareScan does not support direct communication between the Services Manager and eCopy-enabled devices. However, when the Novell client is installed on the PC that is running the Services Manager, some connectors (Quick Connect, Scan to eCopy Desktop, and LDAP/SMTP) can use a back-end Novell server for authentication and temporary file storage (of scan inboxes).

Novell environment for eCopy-enabled devices with embedded Clients



Novell environment for ScanStation



Although Windows includes the Microsoft Client for NetWare Networks, eCopy has not tested ShareScan with this client software and cannot recommend it. You should install the same NetWare client you are using on the rest of your networked PCs. eCopy strongly recommends that you install the latest 32-bit Novell client.

Note: If you have a Novell network with multiple trees, you must set the Preferred tree field in the Novell client configuration for the eCopy Inbox Agent (see page 245) and Scan to eCopy Desktop connector to function properly.

Device setup for MEAP-enabled devices

These instructions describe how to obtain or configure the network settings on a MEAP-enabled device.

To configure network settings on a MEAP-enabled device.

1. On the device keypad, press **Additional Functions**.
2. Press **System Settings**.
3. Press **Network Settings**.

   The **Network Settings** window appears.
4. Press **TCP/IP Settings**.

   The **TCP/IP Settings** window appears.
5. Press **IP Address Settings**.

   The **IP Address Settings** window appears.
6. Verify the following settings and then press **OK**.
   - **DHCP:** Not recommended in a domain-based network environment. Do not enable in a workgroup environment.
   - **IP Address:** Use of static IP addresses is highly recommended.
   - **Subnet Mask:** Set according to site guidelines. ShareScan does not use this setting.
   - **Gateway Address:** Should be blank, unless another MEAP application requires a specific gateway address.
7. In the **TCP/IP Settings** window, press **DNS Server Settings**.

   The **DNS Server Settings** window appears.

8 Verify the following settings and then press **OK**.

- **Primary Server (DNS):** Not required in a domain-based network environment. However, if you do not specify a DNS server, the Services Manager PC must have a static IP address. In a workgroup environment, this field must be blank.
- **Secondary Server (DNS):** Leave this field blank.
- **Host Name:** Enter a unique name for the device, up to 60 characters.
- **Domain Name:** Enter a domain name, if applicable.
- **Dynamic DNS Update:** Should be set to **On**.

9 Press **Done** until the main screen appears.

10 Power cycle the device so that the new settings will take effect.

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